

The Management of Opera

An International Comparative Study

Philippe Agid and
Jean-Claude Tarondeau



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Foreword © Anthony Freud 2010

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Foreword

Opera is a mystery. This cumbersome, expensive relic of the past, so absurd in its conventional demand that people should sing when offering each other a whisky or lamenting that they have dropped their key, refuses to fade away. Instead, it acquires new converts every year; and converts is what it demands, for like a religion, it changes the lives of those it wins over, transforming them into acolytes and partisans who will queue all night in a blizzard to buy tickets, or cross continents for a performance – who think, talk, read and dream about the art that is their avocation. . . .

Opera has this potency because it is itself mysterious. . . . It is the song of our irrationality, of the instinctual savagery which our jobs and routines and our non-singing voices belie, of the music our bodies make. It is an art devoted to love and death (and especially to the cryptic alliance between them); to the definition and the interchangeability of the sexes; to madness and devilment. . . .

The characters of opera obey neither moral nor social law. . . . These people sing what they feel, rather than tamely speaking (like the rest of us) what they think they ought to say. Love and hate tend to reduce us to speechlessness – to embarrassed stammering or expletives. . . . Words are always failing us when we need them the most. To remain articulate in states of extreme emotional intensity almost convicts you of insincerity. Love poetry often apologizes for its linguistic fluency, afraid it will seem specious. But when words give up, music takes over.

—Peter Conrad, *A Song of Love and Death* (1987)

Peter Conrad encapsulates what, I suspect, many of us feel about opera; particularly those of us for whom opera has been both a life-long passion and a means of earning a living. In spite of its wondrous, logic-defying lunacy (or perhaps because of it), opera continues, 400 years after its birth, to be a worldwide phenomenon, enjoying great popularity throughout Europe, the Americas, Australia and in parts of Asia.

The fact that it is possible to experience live performances of opera, inevitably of varying quality, in so many of the world's towns and cities, should be a cause for both amazement and celebration. Amazement, because the mechanics of producing and performing opera are so complicated. Any opera performance is the result of immense dedication and hard work by a large number of people with diverse skills. It also requires significant financial resources. Celebration because, at its best, opera offers revelatory, life-enhancing experiences, without which the world in general, and society in particular, would be much the poorer.

In my opinion, an opera company (as opposed to an entirely ad hoc group of people coming together for a single event), has, time and time again, proved to be the most effective vehicle for delivering consistent and high performance quality. What is a company? There is no simple answer. Certainly, for an opera-producing organization to be a company, it has to aspire to an ongoing life, to a developing and maturing artistic evolution, and to elements of consistency in artistic, technical and administrative personnel from one production to the next, and from one season to the next.

That being said, the range of opera companies throughout the world encompasses diversity and variety that defy straightforward categorization. There is an infinite number of variables – for example, of scale, of resources, of nature of ensembles, of season and performance structures – quite apart from the immense diversity of cultural, social, political and economic environments within which opera companies operate.

I would argue that without a significant infrastructure of cultural organizations, it is impossible for a city to claim the status of being major. An opera company must be an indispensable part of this infrastructure.

If confronted with the task of creating from scratch the ideal city, what would its opera company look like? What would it seek to achieve? Whom would it seek to serve? How would it be structured and staffed? How would its seasons be constructed? Luckily, the concept of inventing a generic opera company serving a generic city is unlikely to be more than an academic exercise.

While none of us is likely to be given this challenge in reality, is it possible to learn lessons by comparing companies around the world and the ways in which they seek to serve their cities? Are there examples of best practice, artistic, financial or organizational trends, repeating instances of success (and failure) that transcend the diversity of companies and their environments?

This book provides us with the means to examine and answer some of these questions. As a result of years of extensive and meticulous research, compilation of statistical information and comparative analysis, Philippe Agid and Jean Claude Tarondeau have created a unique book: one that examines in a methodical, disciplined and factual way, the similarities and differences between a wide range of opera companies around Europe and North America. Between them, Agid and Tarondeau encompass the skills of both an experienced, senior opera administrator and those of a distinguished professor of management.

In some ways, my own life and career has resonances of the variety of situations that this book seeks to analyse. I was born in the UK, of Hungarian parents, and I am currently living and working in the USA. Since March 2006, I have been general director and chief executive officer of Houston Grand Opera, one of the most important and distinguished of American opera companies. From 1994 to 2005, I served as general director of the Welsh National Opera, an equally distinguished British opera company.

Having moved from Europe to the USA, I have become acutely aware of similarities and differences between the continents in the business of producing opera. We are, for example, united by our passion for our art form, our determination to provide a cultural service to our cities and our striving to achieve artistic excellence (though it must be said that there are as many definitions of artistic excellence as there are opera companies or even audience members). Examples of marked differences include our funding systems, our organizational structures and the respective involvement of public authorities in the provision of culture.

I continue to be struck by how little serious understanding there is on each side of the Atlantic about opera on the other. There is a perception in the USA that a funding system based on public subsidy results in a utopian world in which blissful general directors await their next big subsidy cheque while dreaming languidly of high art. Europeans think that the US system, based largely on private funding, results in artistic decisions being driven by the whims of capricious, wealthy donors, who, having more money than sense, care only about their own prestige.

From my personal experience, I can assure you that neither perception comes close to the truth. Of course, there are always extreme examples of extraordinary incidents. But the reality is much more complex and subtle. It deserves detailed and thorough analysis. Both systems have worked extremely well for many companies over many decades. Both systems have generated countless examples of immensely distinguished

work. Neither system is perfect. Naturally, each system has resulted in infrastructures and companies that reflect its specific strengths and weaknesses.

This book provides the foundation for a deeper shared understanding.

If I was asked to identify the most significant difference in the life of a general director in the UK and America, I would say that it is the amount of time I now have to spend worrying about cash flow: however inadequate the level of public subsidy, a predictable, periodic subsidy cheque is a buffer and a safety net against alarming and unpredictable economic volatility. Without this luxury, given the high overhead costs of many opera companies, and without sufficient vigilance, financial disaster could quickly overtake a company.

I am privileged to be chairman of the board of *Opera America*, having previously served in the same capacity at *Opera Europa*. These two sibling organizations represent the opera profession on each continent. The two have much in common. They both lead and serve our business by facilitating collaboration between companies, examining and recommending best practice in many specialist areas, and in raising public, political and media awareness of our art form, its value and importance. Both organizations have carried out valuable research, enabling comparisons between companies and a better understanding of opportunities and threats.

However, the biggest difference between the two lies in the contrasting nature of their respective memberships. The professional company membership of *Opera America* has great diversity of scale: though there are a small number of extremely large companies (indeed, all the large opera companies in the USA are in our membership), the majority are not full-time, full-scale organizations, but much smaller, seasonal operations. In spite of regional differences, all share a common social, economic and political environment and funding system.

In contrast, the majority of *Opera Europa's* members are full-time companies (albeit of varying sizes), with enormously diverse histories, in some cases spanning centuries, reflecting the histories of the cities and countries in which they are based. Wide-ranging political, economic and social contrasts in the histories of European countries have impacted directly and fundamentally on those countries' opera companies and their operations.

In recent years, multifaceted globalization has made the world a smaller place in so many ways. Historic differences between companies and countries have become blurred. Now, more than ever, opera companies must learn from colleague organizations from around the world, if

they are to stand the best chances of fulfilling potential and overcoming challenges.

There has never been a more important time for *Opera America* and *Opera Europa* to serve our business by working to develop mutual understanding and collaboration.

Similarly, there has never been a more relevant time for this book to be published. The Agid and Tarondeau study fills a gaping hole in available information. I urge all my colleagues in opera companies around the world, and, indeed, all those interested in professional opera production, to read and digest its contents.

We are living through uniquely challenging times. The world around us is changing at a bewildering speed. We need all the resources at our disposal to understand, analyse and respond to the opportunities and challenges swirling around us; our ability to respond swiftly and accurately has become ever more critical. We cannot afford to exist in hermetically sealed bubbles. We must work together, as a worldwide community of opera companies, sharing experiences both positive and negative, learning from one another, and ensuring, as we move through the 21st century, that opera becomes more relevant and indispensable than ever.

Opera and opera companies can thrive. But we must be on our mettle.

Anthony Freud
Houston, Texas
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Introduction

The already highly international art of Western opera has gone more global again in recent years. New theatres have been erected in its honour on all five continents during the last 50 years, and exist as monuments of contemporary architecture in their own right. Freed from dependence on a specific opera house, many great artists and producers – conductors, directors, soloists, set designers, lighting designers and other specialists – travel the world to ply their trade wherever their talent can be displayed and their reputation recognized.

All over the world, opera houses are symbolic institutions, through their audience, the prestige of the artists who perform in them, the social status of their general managers, the opulence of their auditoriums and the popularity of the major lyric works – the so-called “warhorses”. Yet all opera houses everywhere are faced with cultural, management, financial and governance questions.

Opera is a major performing art – Wagner’s “*gesamtkunstwerke*” or “total art” – combining instrumental and vocal music, dance and drama. But this all-encompassing quality, which is what sets it apart from other performing arts, is also the source of its complexity and cumbersome-ness. An opera live performance means the existence of a theatre or an auditorium, plus the presence of an orchestra and often a chorus, the size of which may be over a hundred musicians or choristers given the title. It stages a repertory of works that may require a considerable number of principal artists, minor parts and technicians to set up and run the performances. Most of these works were composed over a century ago, when labour was cheap. Today, production costs are so high that only one quarter on average is paid by those who attend the opera performances.

Opera house programming, or scheduling the works to be presented to the public season after season, highlights the popularity of operas from

the past and the lukewarm audience reception met by contemporary operas. The cultural stakes are very high. Are opera houses becoming museums, institutions whose missions are to preserve rather than create? Up to what point are they creative? Why do they deserve so much public funding from European countries and tax deductible private donations in North America?

Depending on the region of the world concerned, the audience for opera is limited to 2 per cent or 3 per cent of the population. This audience has a high social and cultural background, and a high average age, though strong policies and practices exist to attract with reasonable tariffs as many new opera goers as possible.

This book seeks to answer these concerns.

The extreme diversity of situations justifies the comparative analysis approach applied, especially as no comparative study has to our knowledge ever been published on this subject. In this field, international comparisons make sense. The aim is to identify and understand how problems which are often identical are addressed and solved in different places, to identify what seem to be the best observable practices and to suggest paths or solutions that take account of differences in the local environment.

Our comparative analysis uses figures collected for a sample of 80 opera houses located mainly in Europe and North America. We have generally used 2005–06 and 2006–07 figures for the statistical analysis. When using fresher figures in the text, we always mention the time reference. Some of the figures come from *Opera America* which is a private association of 112 North American opera houses and companies. Others have been found in the annual *Deutscher Bühnenverein Theaterstatistik* books which are public. Both *Opera America* and the *Deutscher Bühnenverein* have multi-year track record figures which to this day are unique in the opera's world, though their accounting methods differ on certain points. Another group of figures comes from *Opera Europa* members who are presently building a database. The results of statistical analyses on this sample have been enhanced, confirmed or invalidated by interviews on both continents with some 20 opera house management teams. In a few cases, minor discrepancies may exist between figures of the comparative analysis and figures of the text, due to the time length of our work from 2006 to 2010.

The book is organized into nine chapters.

The first chapter gives a description of opera houses based on the figures in our possession, bringing out an enlightening picture of their similarities and differences. Among the similarities, programming practices are very homogeneous across all opera houses. Among the

differences, production modes and economic models differ so greatly that an “American model” emerges that contrasts with a “German model”.

The second chapter discusses what opera house general managers consider as their major decision-making area: programming or the choice of titles to be staged in each season. Similarities far outweigh differences on this point. The same 50 operas, mostly composed in the 19th century or the first half of the 20th century, are performed everywhere. Contemporary works make a brief appearance and then disappear, having failed to attract a large enough audience for subsequent revivals.

On a macroeconomic level, significant differences are observed between North America and Europe. For the same overall audience levels, the American houses present a small number of performances in large theatres, whereas the Europeans use small theatres but put on a large number of performances. The former adopt the “*stagione*” model: a low volume of productions and low alternation; while the latter, at least in Germany, remain faithful to the “repertory” system with a large number of titles and performances, alternating between several different productions in a week. Naturally, the financial positions of opera houses vary, because the two factors of production volume and seating capacity are the greatest source of differentiation in opera house costs. While production processes are broadly the same, consisting of an “assemblage” of resources and learning, the way they are organized varies from integrated opera theatres, where everything is done in-house, to theatres that purchase and outsource for variable parts of their needed resources or the whole of them. As we shall see, the “assemblers” are not always to be found where the reader might expect.

Audience success and development is decisive to opera houses, whatever the importance of the box office revenue in their total budgets. Box office managers have to handle two conflicting issues. One is to maximize the revenue issued from sales. The other is to ensure that the opera performances are open to enlarged publics which will be, up to a point, tomorrow’s audience. These two issues exist on both continents. We try to measure their relative importance, and compare policies and methods. In 2006, the launching of high-definition (HD) premieres by the New York Metropolitan Opera in cinemas all over the world might be a major breakthrough in enlarging opera audiences. We try to understand the pros and cons of this new development.

The theatre building is a major success factor for institutional opera houses and companies. The architecture of the auditorium determines its seating capacity, the orchestra pit limits access to a certain repertory and the backstage area can facilitate or rule out alternation of

productions. Opera house general managers' strategic decisions are constrained by the buildings they can use for the best and sometimes for the worst. Full understanding of opera house management must take theatre architecture and facilities into consideration, and that is the subject of the fifth chapter.

Despite many challenges, opera houses are highly proactive and innovative, adopting adjustment strategies that vary greatly on either side of the Atlantic. We could sum up by saying that in the USA, opera houses are economic entities that live on their relationships with their markets of spectators and donors; and in Europe, they have more conservative or close relationships with public organizations supporting them financially. This is reflected in their organization structures, governance modes and economic performances. Opera house governance, that is, the division of power between either boards of trustees in the USA or the national or local public authorities in Europe *and* the theatre's management teams, is often a source of problems which we review: long-term perspectives, choice of general managers, internal organization, sometimes over-bureaucratic procedures. The sixth and seventh chapters show the links between funding sources and methods, and between governance and organization.

Observation of opera houses over the last few decades shows that some of them have been through crises that sometimes threatened their very existence. The eighth chapter attempts to answer the question: what can be learned from crises?

Under the many constraints inherited from the past or arising from economic and political environments, operating under the supervision of the authorities or the influence of private sponsors, are opera houses truly able to define their own strategy? An original statistical analysis enhanced by the views of opera house general managers supplies some answers to this question, as reported in the final chapter.

Then comes the time to look towards opera's uncertain but fascinating perspectives before the curtain shuts down.

1

Opera Houses: Order and Diversity

This chapter is to our book what the overture of an opera often is for its audience. It introduces the dominant themes, constructs the whole and sets things in motion. The overture of an opera, sometimes substantial, sometimes brief and introductory, gives the spectator or listener their first impression of where the opera will take them.

This is also the aim of our opening chapter: to understand and broadly compare the similarities and differences between opera houses in Europe and North America, before looking in more detail at their practices, policies and performances in the following chapters.

This is done in two steps.

The first identifies the characteristics shared by all opera houses in the world, and also the different institutional contexts in which they operate. Sources are found in the rich body of existing literature, or the information that opera houses are increasingly supplying on their own websites.

Next, the figures collected are used for a comparative study resulting from compilation of key figures for 80 opera houses, plus construction of certain quantifiable variables. This brings out several key data which describe the administration or management of opera houses, such that they can be compared, and major correlations between the different houses' key figures can be highlighted.

These two steps of qualitative and quantitative analysis show how the influence of the environment – historical and geographical – is paramount in explaining the differences observed between opera houses. From the diversity of organizations and their contexts, an American model and a German model emerge, dissimilar in almost every way. Many European opera houses occupy intermediate, sometimes innovative, positions, with a tendency towards one of the two dominant models.

1. A common heritage but different contexts

Opera is part of the heritage of humanity and its prestige and dissemination throughout the world continue. The great operas of the past and present are produced and staged everywhere. New theatres for opera houses are being built on all the continents. Asia, which has its own operatic traditions, is adopting Western operatic art. In any period and any part of the world, opera shows stable common features, but the opera houses themselves must adapt to a range of cultural, economic and social environments. The features common to all opera houses are rooted in institutional contexts that are often very different.

An increased world repertory.

As stated by Nicholas Payne, in the early 1960s “the standard repertory covered two hundred years, from Gluck’s *Orfeo* to the (then) new operas of Britten and Henze. Today, it encompasses four hundred years, from Monteverdi’s *Orfeo* to Birtwistle’s, still classically derived, *Minotaur*. The breadth of this much richer heritage is demonstrated by the latest edition of *Opera Europa’s* Future Production Plans database, in which a cross-section of 52 companies lists 450 productions of 250 operas by 128 composers. The downside of this gain is that it can leave less space for new creations, which may be marginalised by the sheer bulk of opera’s magnificent legacy. Yet, the same database includes 40 new operas in its total, a proportion of 16%”.¹

Opera: a symbolic artistic and social institution

The first common feature of opera houses naturally concerns the operas (works) themselves. Of the operas composed between the late 16th century and the modern day, many belong to the masterpieces of performing arts, from *The Coronation of Poppea* to *Billy Budd*, the works of Mozart to the works of Wagner, Verdi, Puccini, Richard Strauss or Britten. The same famous operas are performed all over the world.

The popularity of opera has waxed and waned through the ages. Certain works are very popular, some ever since they were first created, others only in more recent periods. Mozart’s *The Magic Flute* is beloved, if not worshipped, throughout the world. Performances of *La Bohème* by Puccini, *Carmen* by Bizet and *La Traviata* by Verdi continue to pull in the crowds from Turin to San Francisco, Leeds to Vancouver, or London to Warsaw. During the 2006–07 season in Germany, *The Magic Flute* was performed 694 times before a total 348,998 spectators, and Humperdinck’s *Hansel and Gretel* totalled 249 performances and 155,882 spectators!²

The opera – interest in the operas themselves, but also in the opera houses and companies that produce and perform them – has never ceased to be a major societal issue, and again this is true all over the world. In Europe, from the late 16th century onwards, kings and princes gave operas their respectability as a major art form. Opera was an entertainment provided by courts, often to enhance the glory of princes, kings or emperors. Opera was performed in existing venues and progressively in specially created theatres. In Italy and then in Paris, bright theatrical and scenic dimensions of opera performances were considered as a key dimension of the art form as early as the 17th century. Court and town theatres coexisted in 18th-century Europe. As the town theatres gradually came to dominate in Europe, having a box or a season ticket at the opera came everywhere to be a sign of belonging to the aristocratic, political, economic or intellectual elite. In the first part of the 19th century, the internal architecture of opera houses was designed as much as to present the operas to their best advantage as to allow spectators to see and be seen. In many Italian opera houses, and also at the Opéra National de Paris, boxes could then be purchased or rented, sometimes for life, generally by the year. In Italy, opera houses were often built by families who in return possessed boxes. Until 1980, the private owners of the Barcelona Liceu opera house held shares in the form of one, two, three, four or five seats which they could use or hire out! In 19th-century Europe, the operas were often staged as grandiose spectacles. The terminology leaves us in no doubt. There was talk of French-style “grand opera” as far away as the USA. In Houston, the term “Grand Opera” is part of the opera house’s name. In the USA, where no courts, states or cities oversaw the development of opera, there was close interest in European opera as early as the 18th century, and wealthy inhabitants played a progressive but active role in the establishment of opera houses, and their financing.

Everywhere in the world, three dimensions coexist in opera performances in different proportions which may vary given places and situations: the interest for the opera art form in general, the large popularity of many operas and the social prestige. Nowhere in the world can the three dimensions of opera performances be easily separated from the interest in opera houses themselves. There is always at least an element of social prestige among some spectators, who are often willing to pay over and above the top prices for their seats, but there can be no doubt about the love and interest in the operas felt by those who attend the performances whatever their social status. Opera productions are often major popular successes, attributable to either the

works or the artists involved. In 1997, Turin was captivated by Puccini and Luciano Pavarotti during ten performances of *La Bohème* to mark the 100th anniversary of the creation of the work at the Teatro Regio. Maria Callas was venerated in Milan, London and Paris, Chicago, Dallas and New York. Nowadays Anna Netrebko and Diana Damrau are sought-after international stars, as popular in Europe as in the USA. The elites' enthusiasm for opera is not weaker today than it was a 150 or 200 years ago, wherever they are in the world.

The traditions

Various musical, operatic, choreographic and theatrical traditions, not to mention social and political traditions, exercise deep, vital influences. Their relative importance and impact vary with the location and they change over time. Some are artistic. In the German courts and principalities until the mid 20th century, orchestral and vocal ensembles made up the backbone of musical life. In the combinations that in the 19th century gave rise to today's theatres and opera houses, orchestras played a central role.³ They sometimes take concrete form in living institutions, that is opera houses, orchestras and choirs, local or more widespread artistic and musical practices, history preserved. They contribute to local and national pride. Naturally, their primary dimension is artistic and cultural. Today, there are 135 professional orchestras in Germany. Some, like the Berliner and Dresdner Staatskapelle, the Leipzig Gewandhaus or the Wiener Philharmoniker (in Austria) have become world-famous institutions. Small towns have their own orchestras which are used in a range of activities, opera being one. In modern times, baroque orchestras formed less than 50 years ago are also building new traditions, such as the so-called baroque groups of musicians and singers set up in different European countries by artists as different as Jean Claude Malgoire, Nikolas Harnoncourt, Stefan Sutkowski, William Christie, Marc Minkowski or Emmanuelle Haïm.

The tradition of presenting great voices, in many US and European capitals with sufficient means, also reflects the need felt by opera house managers to have the most renowned, most sought-after and most popular singers in their productions, because audiences want to see them and that is one of the reasons they come to the opera.

Opera houses are places of memory. The corridor walls at the Chicago Lyric Opera have photos of Maria Callas and the vocal glories of the 1950s and 1960s. The foyers of many German theatres carry busts, paintings or photographs of past conductors and composers, illustrating

the local traditions. Many European and American opera houses have produced books on their history from Barcelona's Liceu⁴ to the Santa Fe Opera Festival. The Berlin's Staatsoper does not forget that Richard Strauss was part of the house. The München and Dresden Staatsoper live with the souvenir of Richard Wagner. Saint Etienne opera house in France cultivates the memory of Massenet, and Lyon of Berlioz. In Italy, an annual festival is held in Pesaro, the town where Rossini was born. Nearer to home, Stravinsky and Hindemith were performed at the Santa Fe Opera Festival, opened in 1957 by John Crosby.

Tradition is also, particularly in Europe as we shall see in more detail later, an attachment, and unconditional devotion to the present theatre buildings, whose heritage value is considered unquestionable. Tradition also depends on long-lasting environmental influences such as public support and funding in Europe, and the private sector exclusive role in opera life in the USA.

Globalization

During the 2008–09 season, the American soprano Joyce di Donato sang in Berlioz's *Beatrice and Benedict* at the Houston Grand Opera in November, *La Traviata* at the Chicago Lyric Opera in December, *Beatrice and Benedict* again in Paris followed by a recital, and then *Rigoletto* in Barcelona, and a Wagner opera at Covent Garden. Joyce Di Donato, who enjoys equal popularity on both sides of the Atlantic, is only one of many examples of globalization in opera.

Such globalization is as old as opera itself. It began in Italy, where the earliest forms of opera appeared in the 16th century, established and financed by the princely courts. Operatic works, composers and families of singers swarmed through Europe's courts in Germany, Austria, Paris, London, Poland and elsewhere. The services of Italian composers and impresarios were sought after everywhere, and this gave rise to the emergence of institutions called the "Italian theatre" in many European cities. The movement reached North America by the end of the 18th century, and gathered momentum in the early 19th century. In 1825, Lorenzo Da Ponte, an emigrant to America, had been the outstanding librettist of Mozart's *Don Giovanni*, *The Marriage of Figaro* and *Così Fan Tutte*. He helped many singers from Europe, such as the Montresor and Garcia families, to put on several operas by Rossini and Mozart. He helped the building and inaugurated the first theatre on the new continent in New York, intended exclusively for opera! On the old continent, Rossini became popular in Italy, France and England; Meyerbeer

triumphed from Paris to Berlin; Donizetti, Bellini, and later Verdi and Wagner were rapidly successful across the whole of Europe and in North America. As a composer, Liszt transcribed almost 40 arias and melodies from contemporary operas that have become famous in their own right. As a pianist and generous friend, Liszt took the most famous arias from the operas of the time all over Europe, thus helping to promote them. Throughout the 19th century, little time elapsed between creations of new operas in Europe and their first performances in North America. Singers and divas of all nationalities travelled and performed wherever their fame was bankable, and commanded sizeable fees. Singers, conductors and composers moved from country to country, continent to continent. Felix Mottl, Felix Weingartner and Arturo Toscanini achieved the same magnificent success in the USA as in their native Europe. Puccini drew the subjects of many of his operas from the histories, traditions and scenery of the countries they were partly intended for: *The Girl of the Golden West*, the USA; *Madame Butterfly*, Japan and the USA; *Turandot*, China. *Tosca* was set in Rome and *La Bohème* in Paris. The globalization of opera has a long history behind it.

Globalization, in the past and today, also involves the well-publicized movement of opera house managers from one theatre or one country to another. The French composer André Messager took part in Covent Garden management before he took the reins of the Opéra National de Paris in the second half of the 19th century. Gustav Mahler managed the Vienna State Opera, and also the New York Metropolitan Opera, in the early 20th century.

The circulation of artists and also managing executives is only the most visible aspect of opera house globalization. Others, as we shall see, are just as important: productions and professionals from all countries move between the opera houses; the production methods are tending to converge, if not become standardized; and generally accepted quality standards are emerging.

The omnipresent financial dimension of opera houses

It is universally reflected that every opera house is unable to achieve financial equilibrium solely through resources generated by the production and performance of operas, regardless of the ticket prices – even when they are very high. The interest in and attraction of opera as an artistic genre and opera houses as institutions is only equalled by the scale, and often the gravity, of the financing problems they raise. These difficulties are permanent, and in this year of 2010 they have taken on

a particular significance due to the worldwide financial, economic and social crisis – the worst since 1929.

Opera, wherever it is performed, is a synonym of high costs.

One performance of an opera, whether in Saint Louis (Missouri, USA), Lyon (France), Leeds (UK) or Erfurt (Germany), requires an orchestra that rarely numbers less than 60 musicians and may on occasion comprise more than 80, in many cases a chorus consisting of at least 30 members, and solo singers. These men and women are sometimes permanent employees of the opera houses, and sometimes freelancers paid negotiated fees. In addition to these remunerations, either the opera house or the company must pay stage technicians, stagehands, lighting technicians, props managers, dressers, hairdressers and make-up artists or hire the services of existing venues. In many cases, the opera houses have their own workshops where sets, costumes and props are made. Otherwise, they buy them from external sources. Only sets, costumes and props can be stored, hired out, sold or loaned. Each additional performance of an existing production requires the participation of all the artists and technicians who worked on the first. The opera is a labour-intensive activity, using often a highly skilled and sophisticated, and therefore expensive, labour force.

The popularity of world-famous artists, singers, conductors and directors has historically gone hand in hand with sometimes very high fees, which makes the ticket price level more comprehensible. On 29 January 2010, the Mississippi Opera closed its season with a recital by Renée Fleming. Ticket prices ranged from \$90 to \$500. Carlos Kleiber, who was one of the greatest concert and opera conductors of the second half of the 20th century, made few appearances. When he was conducting in Germany, he was sometimes paid in the form of a high range car made by BMW, Audi or Mercedes.

Production of a luxurious, memorable, astonishing spectacle has been part of the tradition at some opera houses – not all – ever since opera has existed. In the 18th century in Italy and France, there were developments for sets and machines that were hailed as major innovations. Today, many opera houses have technological resources that would have been unthinkable 50 years ago: principally, state-of-the-art engines, computer-controlled equipment, pre-recorded lighting effects, mechanical transport carts to move sets around on stage or from the stage to the place they are assembled or dismantled. All these facilities require costly investment, and still need technicians to operate them. The luxuriousness of opera productions and sets in the 19th century was mainly if not exclusively experienced at the opera. Today, cinema, television

and other forms of performing arts have made luxurious production values seem normal, and spectators expect opera performances to meet identical criteria.

There is a clear link between the considerable financing requirements and the various and significant expenses that are necessary if an opera house is to fulfil its performing arts function. To a lesser degree, opera companies not having their own venues face the same constraints. The financing requirements are often enormous. It is accepted everywhere that tickets sold to spectators can only bring in a fraction of the funding needed by opera houses. Additional funds are needed if opera houses are to be in a position to produce, or be “in working order”,⁵ before embarking on any theatrical or operatic activity, and to enable them to stage plays and operas by supplementing box office income. Economic models differ in the USA and in Europe, but the necessity for opera houses or companies to benefit from contributed revenues is the same.

Many stakeholders would like to have larger shares of the resources gathered by opera houses. A balance must be struck between the primary allocations of financial resources and the choice of artistic policy. Orchestras and choirs are expensive, but whatever the solutions they are unavoidable. In differing ways in Europe and the USA, unions of performers, technicians and administrative staff negotiate for the best pay and decent working conditions for their members.

Opera houses: management complexity

All managers of opera houses, whatever their structure and town or country of location, have been or will be faced with issues that have in fact changed little over the centuries. Opera houses are made up of men and women employed on a full- or seasonal-time basis, exercising a large range of professions, from artistic performers to craftsmen working on sets and costumes, to people in the administrative, financial and sales functions. Opera house managers must simultaneously plan and programme their theatre’s activities over several years horizon times, lead the management teams, foster creativity in the people who design and produce the operas, be able to motivate but also maintain the necessary discipline, while also preventing or settling conflicts as best as possible, dealing with artistic temperaments, passing effortlessly from attention to artistic details to nagging financing problems, or the resolution of labour problems within the house. They must also have skill and personal authority, be good listeners and decision-makers, find the right words, be approachable and put in long hours. But their

main concern is to guarantee the artistic quality of the operas staged in their opera houses. These management requirements perhaps explain why certain opera house leaders in the USA use the French expression *l'Edifice complexe* to qualify their organizations.

Different institutional contexts

As heirs in Europe of the protection, and often the financial backing, of princes, kings and emperors from the 16th to 19th centuries, opera houses on the old continent are protected cultural institutions, financed by public authorities, cities, regions, provinces or Länder, and sometimes directly financed by the national state administrations or public agencies. Most of them in Europe depend on public subsidies for more than 80 per cent of their funding. Some opera houses are still state institutions: examples are the Opéra National de Paris, La Monnaie in Brussels, the Nederlandse Opera in Amsterdam and opera houses in the capitals of most former Eastern European countries. In Spain, the Gran Teatro del Liceu in Barcelona and the Teatro Real in Madrid draw approximately 50 per cent of their finances from public organizations. Covent Garden theatre in London receives less than 30 per cent of its financing from the public agency Arts Council England, but continues to bear the name of the Royal Opera House, a symbolic indication of its national and public prestige.

In the USA, the historical background is totally different. The American federal state has never been involved in any opera house's direct financing. Opera houses and opera companies are always born of private initiatives and financing, with the occasional intervention of foundations supported or financed by the federal state. Their financial contribution remains more than marginal compared to the overall costs. In both Europe and the USA, there are exceptions to the dominant model. Europe has major opera houses with purely private sector financing (Glyndebourne, Baden-Baden) and the USA has some with partly public sector financing (Washington, Utah Symphony and Opera).

These very different contexts and financing methods have an influence on the objectives related to non-internally generated financing. The public subsidies received by European opera houses are founded on explicit and implicit objectives and concerns. Private donations and contributions, which play a decisive role in North America and are increasingly important at several European opera houses, are also driven by a wide range of motivations and aims, which we seek to identify in the rest of this book.

Different economic structures

The worldwide “opera industry” described in Table 1.1 is composed of about 300 houses or companies producing 15,000 performances a year. The German speaking area – Germany, Austria and Northern Switzerland – offers 44 per cent of these performances compared to 15 per cent for North America and 41 per cent in the rest of the world. This figure of 300 entities does not comprise informal opera activities and sometimes companies who want to remain informal.

Opera houses or companies sell 13–15 million tickets in a year or season to an estimated 6–8 million people. Each performance attracts on average 1,800 spectators in North America compared to 800 in the rest of the world.

As can be expected, the opera industry is labour intensive with about 70 per cent of the total budget devoted to personnel expenses. Artistic, technical and administrative expenses account for around two thirds of the total budget all over the world.

In North America and Germany, similarities and differences can be observed in the structure of opera on offer. In both zones, opera availability is concentrated in a small number of large houses. But the concentration is higher in North America, where 20 per cent of houses account for 75 per cent of the total audience, compared with 32 per cent of German opera houses for the same share of the audience.

The 112 opera houses and companies listed in *Opera America* membership⁶ stage 2,300 performances and welcome 4.3 million spectators per season, with an average audience of 1,870 per performance. A more or less identical number of opera tickets is sold in Germany by

Table 1.1 The worldwide “opera industry” in brief

	German space*	North America**	Rest of the world (estimation)
Total turnover	€2,400 m	€700 m	€2,000 m
Earned income %	25	51	27
– Box office %	15	36	19
Contributed income	75	49	73
– Private origin %	–	87	7
– Public origin %	99	–	93
– Financial origin %	1	13	–

Source: Estimates from **Deutscher Bühnenverein Theaterstatistik*, ***Opera America* statistics, *Opera Europa* database (2006–07).

the 90 Musiktheater where opera performances take place as listed in the *Deutscher Bühnenverein*:⁷ 4.3 million spectators for a total population that is four times smaller. The structure of opera on offer is radically different in the two zones: German opera houses put on 6,600 performances per season for an average audience of 760 per performance. With the same total audience as in North America, German opera houses perform three times as often before audiences that are three times smaller. It is easy to understand that the economic balance of opera will be very different.

A high proportion of the opera on offer⁸ in both zones concerns a small number of opera houses. In North America, the New York Metropolitan Opera is the venue for 21 per cent of all opera tickets sold in the zone, and the six largest opera houses (5.4 per cent of the total number) account for 50 per cent of all ticket sales. In Germany, there is no dominant house – the Munich Bayerische Staatsoper with its 330,000 spectators (386,000 in 2004–05 and 360,500 in 2007–08) represents only 7.6 per cent of the total audience for German opera houses – but the 12 largest (13.6 per cent of the total number) attract 50 per cent of the audience.

North American and German opera houses have been ranked in order of audience figures, and divided into four groups. The first of these groups is made up of houses with a combined audience of 50 per cent of their zone's total opera audience. The second group brings the total cumulative audience to 75 per cent, the third to 90 per cent and the fourth to 100 per cent.

In North America, groups 1–4 respectively comprise 6, 16, 26 and 60 opera houses and companies. The same ranking principle was applied to German opera houses. Groups 1–4 respectively comprise 12, 16, 20 and 40 opera houses and companies.

The differences in structure between American and German opera houses are clearly visible in comparing Figures 1.1 and 1.2. American opera is concentrated in a very small number of large theatres, while German opera is spread across a larger number of theatres.⁹ In Germany, the average number of performances for Group 4 opera houses is similar to the average number at the smallest opera house in North America's Group 1. The average production volume for opera houses in the German Group 2 is equivalent to the figure for the American Group 1.

In every group, German houses put on a larger number of performances than their North American counterparts, but with a smaller number of spectators per performance. As presented on Figure 1.3, the average audience size per opera performance is 1,870 in North America

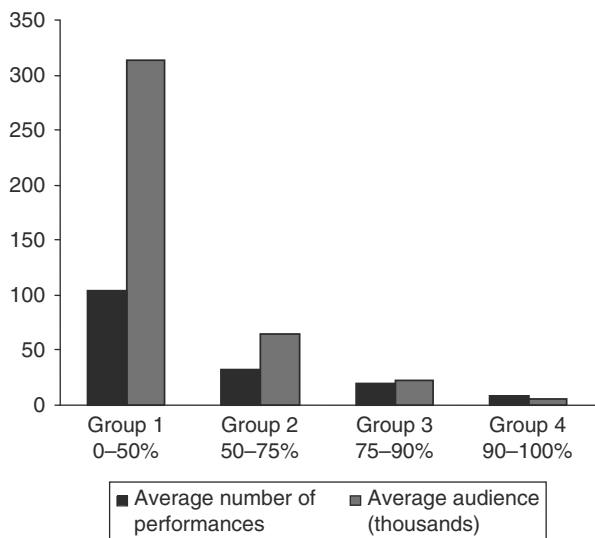


Figure 1.1 North American opera houses' average audience

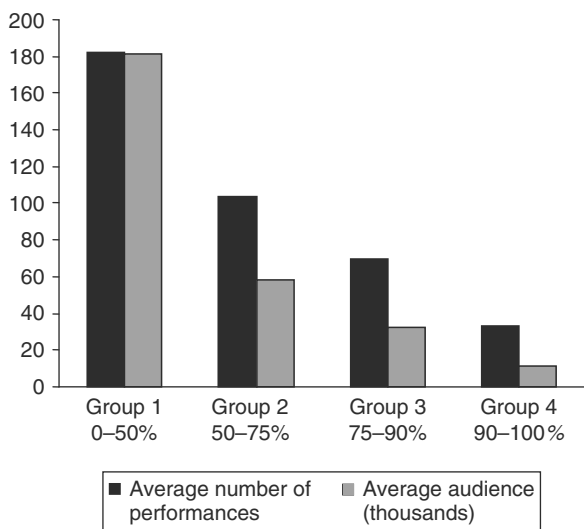


Figure 1.2 German opera houses' average audience

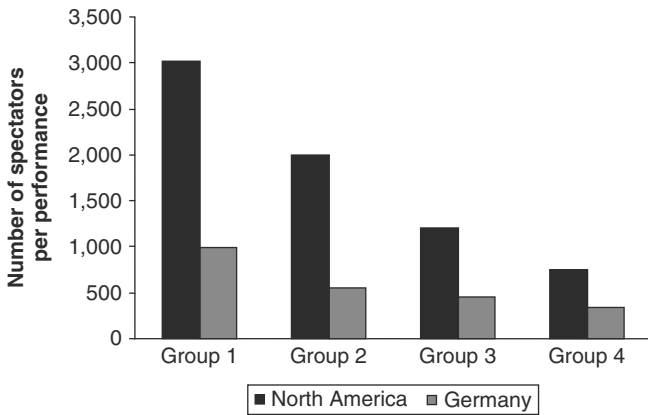


Figure 1.3 Audience size per performance: North America, Germany

compared to 760 in Germany (830 in France). The same proportions can be observed in all four groups of opera houses.¹⁰

2. An order emerges from the diversity

Opera has spread throughout the whole world, and is continuing to develop. But the highest concentration of opera houses is in Europe, where it originated, and in North America. What makes a theatre an “opera house” or an “opera company” is the staging of sung dramatic works belonging to a recognized repertory, composed according to the rules specific to operatic art, which evolve over time under the influence of the most creative composers. In all other aspects, each opera house or opera company is different from all the others. There are very large houses putting on more than 200 opera performances a year, and small houses staging only a few. In the USA, opera houses and companies most often specialize in opera alone. Often, in Europe, they also present ballets, concerts, operettas, sometimes musicals and even plays. Some opera houses have permanent or semi-permanent in-house resources to produce their own sets, costumes and props, while others perform works originally produced elsewhere, adapted to their own theatres. Some opera houses have all the components and skills necessary to stage an opera: orchestra, choir, technical workshops, stage technicians and sometimes even training schools; while others, including some large or very large houses, do not have their own orchestra, choir or workshops and may be tenants, sometimes temporary tenants, of the theatres

in which they perform. Naturally, this is reflected in significant differences in budget volume, but also in large differences in cost and income structures.

In order to examine this diversity, attempt to explain it and classify it, we have carried out a comparative study of opera houses' key figures. This study is presented in five sections.

The first section describes our sample of opera houses, the sources of the data used and the analysis method applied. The four following sections analyse the practices, policies and performances of opera houses in terms of artistic policy, production policy, the environmental conditions and certain financial and non-financial performances. This leads us to formulate hypotheses that may explain the differences observed. A comparison between an "American" model and a "German" model suggests that history and geography provide a key for the organization of our observations.

Database and analysis method

This comparative study concerns a sample of 67 opera houses located all over the world (see *Table A.2*, p. 274). The data collected concern the 2004–05 and 2005–06 seasons, and in a few cases, the year 2006. They provide a quasi-snapshot of the situation and naturally cannot indicate any trends. Trends will be discussed wherever possible in the rest of the book, drawing on additional sources of information, particularly interviews with opera house general managers and staff.

Five data sources were used. For information on programming, the Opera Base website (<http://www.operabase.com>) provided data on 66 opera houses that put on 336 operas during the 2006–07 season, in 972 productions totalling 6,394 performances. Regarding production activities, resources and costs, we were able to use 32 answers to a questionnaire from *Opera Europa* (<http://www.operaeuropa.org>) and 15 equivalent answers concerning North American opera houses, supplied by *Opera America* (<http://www.operaamerica.org>). For the German-speaking zone (Germany, Austria and north of Switzerland), we used data concerning 18 opera houses extracted from the *Deutscher Bühnenverein Theaterstatistik 2004–05*. Some information comes from our study of the Opéra National de Paris compared to the New York Metropolitan, the Vienna Staatsoper and the Bayerische Staatsoper in Munich (Agid and Tarondeau, 2006).

The comparative analyses concern artistic policies, production policies, environmental conditions and financial and non-financial

performances. To make comparison possible, each entity had to be described in measurable or quantifiable criteria. This was a difficult exercise, remaining incomplete and perfectible for criteria such as artistic policy and operatic tradition. It is more straightforward and reliable for costs, income and production volume. Many *Deutscher Bühnenverein* and *Opera America* data are comparable, not all of them for the general reason that the *Deutscher Bühnenverein* statistics cover all the diversified activities of the German Musiktheater. Whatever the difficulties in estimation or uncertainties over the homogeneity of data from different sources, this formal comparative analysis is though a first attempt to describe opera house diversity and will certainly be improved in the future.

Overview of the methods used to compare opera houses

Artistic policy is represented by two blocks of variables which concern the opera house's programming and choice of guest artists. The first reflects the choice of works presented to the public during the season under consideration. It is based on the percentage of performances of the works most often performed by all opera houses or companies in the sample, the percentage of performances of contemporary works and the percentage of performances of works dating from the 19th and first half of the 20th centuries. A "geographical index" reflects the local or non-local origin of the operas performed. The second block concerns the choice of guest artists: conductors, directors and soloists.

Production policy is measured by the number of opera performances scheduled in the season or calendar year. The comparison takes into account the number of new productions and revivals, alternation of works, and the number of newly created works, co-productions, rented productions and touring venues.

Environmental conditions are examined through three indicators and one structural variable. An indicator called "operatic tradition" is used to measure the length of time and degree to which opera is rooted in each geographical area examined. This indicator is based on the percentage of operas performed during the season which were composed in the area. The density of local opera availability is measured by the number of tickets on sale locally per season, compared to the local or regional population. This indicator gives an idea of the intensity of competition between opera houses. The gross income per head (GNI/capita) is used to introduce economic considerations into our analyses. The physical capacity, that is, the number of seats available in each theatre in the sample, is a structural or environmental variable in the sense that it cannot

be modified in the short or medium term by the opera house management, but can have a decisive influence on financial performance, particularly box office income.

The unit costs and income per ticket sold, per performance or per production, and the occupancy rate of the theatres are results that can be linked to artistic and production policies as well as environmental conditions. The average full costs per performance and per ticket sold for each opera house in the sample are analysed because variable costs are not available for a large portion of the sample. For income generated by the activities themselves, it was decided to measure box office income and compare its relative importance for each opera house compared to other sources of financing, whether public subsidies or contributions from foundations, businesses or private individuals. This ratio, called “financial autonomy”, expresses the opera management’s degree of dependence on external financing. In addition to these financial results, we use a physical indicator: the seat occupancy rate.

All these indicators and variables are defined in Table A.1 presented in Appendix A.

Artistic policy

The artistic policy is analysed with reference to two major areas of artistic decisions: the choice of works and the choice of guest artists.

Of the 336 works performed by our sample of opera houses during the 2006–07 season, the 37 most often staged accounted for 3,200 performances, as many as all the 299 other operas performed. There is a clear concentration of opera offerings around a small number of works. Three groups of operas are identified: the “classics” also called “warhorses”, “evergreens” or “blockbusters” are the 10 per cent most often staged, which account for 50 per cent of performances; the “rarities” or the 60 per cent least frequently performed; and between the two, the “possibles”, which represent 30 per cent of operas and 30 per cent of performances. A list of the “classics” is provided in Table 1.2.

The distribution of the programmed operas between the three groups – the classics, the possibles and the rarities, representing 50 per cent, 30 per cent and 20 per cent of performances, respectively – is similar to the results observed for the Opéra National de Paris over the period 1996–2009. Could this be an unwritten rule applicable to all opera houses? Is this for financial reasons or for reasons of audience size?

To answer this, the percentage of performances of “classic” operas staged during the season is calculated for each opera house. The average

Table 1.2 The “classics” or most performed works

<i>La Traviata</i>	<i>The Tales of Hoffmann</i>
<i>Tosca</i>	<i>Gianni Schicchi</i>
<i>Don Giovanni</i>	<i>Der Rosenkavalier</i>
<i>Carmen</i>	<i>Il trovatore</i>
<i>Madame Butterfly</i>	<i>Un ballo in maschera</i>
<i>The Marriage of Figaro</i>	<i>Die Entführung aus dem Serail</i>
<i>The Barber of Seville</i>	<i>Tannhäuser</i>
<i>Così fan tutte</i>	<i>Faust</i>
<i>La Bohème</i>	<i>Cavalleria rusticana</i>
<i>The Magic Flute</i>	<i>Fidelio</i>
<i>Rigoletto</i>	<i>Jenufa</i>
<i>Die Fledermaus</i>	<i>Tristan und Isolde</i>
<i>Lucia di Lammermoor</i>	<i>Falstaff</i>
<i>Aida</i>	<i>Hansel and Gretel</i>
<i>Turandot</i>	<i>Il Tabarro</i>
<i>Eugene Onegin</i>	<i>La clemenza di Tito</i>
<i>Simon Boccanegra</i>	<i>The Queen of Spades</i>
<i>Nabucco</i>	<i>Lohengrin</i>
<i>L'elisir d'amore</i>	

Note: In descending order of the number of performances.

percentage for the whole sample is of course 50 per cent, and this can be used to distinguish opera houses with “conventional” programming (more than 50 per cent of classics) from more “innovative” houses. San Francisco, Toulouse, Prague Statni or the Moscow Stanislavsky and Nemirovich-Danchenko Academic Music Theatre appear to have the most conventional selection of operas, while Grand Théâtre de Genève, Opéra du Rhin in Strasbourg, and the Parisian Champs Elysées and Châtelet theatres appear to be more innovative.¹¹ The largest opera houses – Vienna Staatsoper, Berlin Staatsoper, Dresden Semperoper, Zurich, London Royal Opera House, Paris National Opera – are all in line with average values. The New York Metropolitan Opera is apparently more conventional and the Munich Bayerischer Staatsoper more innovative, but this observation requires confirmation across several seasons. The only institutions that totally escape the 50:30:20 per cent rule are the festivals, which often practise thematic programming and follow totally different logics than the risk-reducing reasoning applicable to the opera houses, especially the largest ones.

Dividing opera houses into three groups based on this criterion of alignment with the classics, we observe that the most innovative houses put on more new productions and fewer revivals than the

more conventional houses, in smaller capacity theatres. On the other hand, the most conventional opera houses have the greatest financial autonomy and the lowest average costs per ticket.

The percentage of performances of contemporary operas stands at an average 7 per cent across the sample, but with considerable variations: from 0 per cent for many houses in areas with a low operatic tradition to 34 per cent at Lausanne.

A relationship can be observed between modernity and a preference for local works. Most of the contemporary operas performed have been composed locally. The opera houses that put on the greatest number of contemporary works have small theatres with high costs per ticket. Conversely, the least modern programming is by opera houses in locations with low opera availability, large physical capacity and low costs per ticket.

The artistic policy also affects casting. Naturally, some conductors, directors and singers have a long-established career behind them, while others are newcomers. Their renown may be international, national or local. The degree of fame measures artists' power of attraction for the opera houses and their audiences, and is itself largely measured by the fees they command. Who are the guest artists? Is their fame international, national or only local? To measure the fame of guest artists (conductors, directors, soloists), the measure proposed by Di Maggio and Stenberg (1985) to analyse theatres' repertoires has been adapted to the three categories of artists. In Table 1.3, the "number of places" stands for the number of houses in which an artist has performed during a season. An aggregate artist attractiveness score is then computed for every house. The process is described in Appendix B.

Dividing opera houses into three groups based on the fame of their guest artists produces results in line with experience and intuition. The largest houses invite the most famous artists for their grand repertory: Vienna, Zurich, Munich and Barcelona are all in the leading group.

The link between high ticket prices and the fame of guest artists appears difficult to dispute. Either the reputation of the guest artists can fill the theatres despite high ticket prices or the use of renowned guest artists justifies the ticket prices. The auditorium size plays a role here: the greater the capacity, the higher the observed average ticket price and the best seating capacity rate. The box office income comes as the product of the number of sold seats by the average ticket price. It is better in large-scale auditoria. This correlation is observed in both North America and Europe, on a varying scale, but undeniably always in the same direction.

Table 1.3 Most frequently invited guest artists (2006–07 season)

Conductors	No. of places	Directors	No. of places	Soloists	No. of places
Adam Fischer	6	Robert Carsen	12	Franco Farina	11
Bruno Campanella	5	Peter Konwitschny	11	Carlos Alvarez	10
Michael Boder	5	Christof Loy	9	Jonas Kaufmann	10
Nicola Luisotti	5	David Poutney	8	José Cura	10
Paolo Carignani	5	David McVicar	7	Joyce Di Donato	10
Patrick Fournillier	5	Marco Arturo Marelli	7	Juan Diego Florez	10
Peter Schneider	5	Willy Decker	7	Plácido Domingo	10
Philippe Jordan	5	Achim Freyer	6	Vesselina Kasarova	10
Plácido Domingo	5	Francesca Zambello	6	Angela Gheorghiu	9
Asher Fisch	4	Günter Krämer	6	Marcelo Alvarez	9

Production policy

It is customary to distinguish between opera houses operating a repertory system, that is, staging a large number of productions of works (including a large proportion of old productions) in alternation during the season and sometimes even during a single week, and opera houses operating a stagione system, that is, staging fewer productions, with little or no alternation, whatever the recent evolutions of the two systems to be analysed further on. To take this diversity into account, we determine the production policy by the number of productions and performances per season, the number of revivals and the number of works in alternation during the week. In addition to these volume indicators, we analyse the production modes: own productions, co-productions, rental or purchase of productions; and the distribution modes: production sale, rental and tours.

The production volume is measured by the number of performances presented. Three groups are identified in Table 1.4. The first comprises opera houses putting on more than 130 performances of operas per season: from Rostov and Vienna, with 296 and 244 performances,

Table 1.4 Number of opera performances per season

Over 130	60–130	Fewer than 60
Rostov	Nuremberg	Athens
Vienna Staatsoper	Milan Scala	Los Angeles
New York Metropolitan	New York City Opera	Napoli
Vienna Volksoper	Madrid Real	Toulouse
Zurich	Helsinki	Washington
Frankfurt	Brussels Monnaie	Venice Fenice
Prague Statni	Leeds Opera North	Houston Grand Opera
Dresden	Barcelona	Seattle
Düsseldorf/Duisburg	Amsterdam	Miami
Paris National Opéra	St Petersburg	Bologna
Munich, Staatsoper	Riga	Lausanne
Berlin Komische	Chicago Lyric	Santa Fe
Köln	Mainz	Zuid
Hamburg	Leipzig	Detroit
Copenhagen	Oslo	Montreal
London Royal Opera	Lyon	Moscow SN Dachencko
Stuttgart	Warsaw	Aarhus
Berlin Deutsche	Paris Chatelet	Paris Champs Elysées
Berlin Staatsoper	San Francisco	San Diego
English National Opera (ENO), London	Tallinn	Dallas
Graz	Cardiff WNO	Vancouver
Mannheim	Turin Regio	Salt Lake City
	Strasbourg	
	Heidelberg	
	Geneva	
	Moscow Bolschoï	
	Antwerp	

Note: In descending order.

respectively, to Graz and Mannheim, with 141 and 134 performances, respectively. The third comprises opera houses with a small number of opera performances: 58 per season in Athens and Los Angeles, and 21 and 20, respectively, in Vancouver and Salt Lake City.

Opera houses from the German-speaking zone dominate the first group, and American opera houses dominate the third. Between the two, naturally, we find the rest of the world that is Europe excluding Germany and Austria, with medium-sized theatres. The large capitals such as New York, Paris and London are exceptions to this rule.

Predictably, all variables expressing the volume of productions and performances are intercorrelated. Each production is performed five to

seven times, and the number of new productions stands at six or seven in the major opera houses, but only two in the smaller ones. Economies of scale reduce the total cost per production for the houses with the most productions or performances.

Network type production, whether in the form of co-production, production rentals or tours, mostly concerns medium-sized houses. This suggests that the large houses have sufficient resources to be self-sufficient to do everything for themselves, whereas the smallest houses perhaps find it difficult to join the networks.

The most active opera houses in each activity: (a) in-house production, (b) co-production, (c) distribution of their productions to other houses and (d) touring performances of their productions are classified by activity in descending order in Table 1.5.

The opera houses with the highest number of productions are generally not involved in the networks for co-productions, production rentals or tours. However, the opera houses that join such networks co-produce, rent their productions and take them on tour. This is true of La Scala in Milan, Barcelona, Chicago and Turin. While German houses give priority to their own productions, medium-sized houses in other parts of

Table 1.5 Production and distribution modes

Producers*	Co-producers**	Distributors**	Tourers***
Vienna Staatsoper	Paris National Opera	Barcelona	Aarhus
Dresden Semperoper	New York City Opera	Turin Regio	Cardiff WNO
Berlin Deutsche Oper	Milan Scala	Washington	Zuid
Hamburg	Barcelona	Los Angeles	Vienna Staatsoper
München, Staatsoper	Madrid Real	Madrid Real	Turin Regio
St Petersburg	Chicago Lyric	New York Met.	Leeds Opera North
Zurich	Copenhagen	Chicago Lyric	Rome
New York Metropolitan	Lausanne	Miami	Berlin Komische
Berlin Staatsoper	Bologna	Toronto	Nuremberg
Frankfurt Staatsoper	Berlin Staatsoper	Milan Scala	Lyon

Note: *In descending order of number of productions per season; **in descending order of number of performances of co-produced or rented productions; ***in descending order of number of performance per season.

Europe and North America participate in production and distribution networks that can broaden their audience and enable them to share production costs.

These analyses highlight the importance of geography in explaining the differences between opera houses, and suggest that the comparison should look at their environments.

Environmental conditions

Opera houses originated in Europe and have spread all over the world. The key operas were composed in Europe – very predominantly in Italy and Germany – and have conquered audiences worldwide. An opera house's environment consists of the way the institution is involved in the local economy and society, but also the potential audience's degree of acculturation.

At this stage of analysis, we focus on differences in operatic tradition, that is, the length of the operatic tradition and the degree to which it is rooted in each geographical zone.

The difference in operatic tradition, at least as measured in this study, indicates clear distinctions between opera houses in terms of production volumes, the number of local works and financial autonomy. The production volume rises with the strength of the operatic tradition. But high production volume is statistically associated with low financial autonomy. This suggests that the operatic tradition, which is determined by history and geography, at least partly determines the situations and strategies of modern opera houses. The cultural environment, examined from the angle of operatic tradition, is expressed through many dimensions and effects.

Today in the USA, more than a century after the founding of the Metropolitan Opera, every state in the country boasts at least one opera company when *Opera America* membership is over 100. The real boom in American opera came after the Second World War. Just as settlers rallied around the construction of opera houses decades earlier, so did groups of concerned citizens work diligently towards the establishment of permanent opera companies. This development goes together with the existence of six opera houses accounting for 50 per cent of the total American audience.

In Germany, due to political and cultural traditions all cities, either Berlin or regional capitals or medium sized have altogether 90 Musiktheater where opera performances take place. After the Second World War, some of these theatres were rebuilt following their previous architecture; some were built with a totally new architecture, sometimes

simple as money was not abundant in this period. More generally, in many European countries, the national and regional capitals, and sometimes even medium-sized towns, were historically duty-bound to have an opera house. It was an institution, a social and cultural building that contributed to the local prestige in the same way as the town hall or cathedral. This tradition is often alive. It is also expressed in the conservation of old, often magnificent theatres inherited from the past. It is considered unthinkable to demolish or alter them simply in order to improve the opera house's economic position. The small average size of theatres in Europe, well known to be a limiting factor for box office income, also bears the traces of history. Many opera houses were built in the mid 19th century, and of course could not have been designed to meet the requirements and constraints that would appear in the second half of the 20th century. The concept of the large multi-purpose theatre in which music and sometimes modern or "popular" dance, operetta and plays would cohabit with opera is to a large extent coherent with the German reality of today's Musiktheater whose design and organization patterns vary from place to place. Even if it was contrary to a long-established tradition in Europe, most European opera houses today have become multi-purpose theatres just because managing only opera activities would not be sufficient to justify their overall costs. The historic attachment to old architecture, still very much alive in "old Europe", locks many opera houses into "heritage palaces", which as we shall see throughout this book impose a problematic economic model.

The density of opera availability – the number of inhabitants per seat available in the conglomeration – measures the intensity of local competition. On average, in our sample an opera house puts approximately 177,000 tickets on sale each year, but in catchment areas of varying sizes, from several thousands to several million potential spectators. The density of local opera on offer reflects the intensity of competition in a given geographical zone. In Berlin, the number of opera houses and their volume of performances are so high that the density is three inhabitants for every ticket available. In Tokyo, it is higher than 100.

In areas with low opera on offer, which are also the areas with the strongest operatic tradition, opera houses are small and put on a large number of performances with relatively low average ticket prices and high costs per ticket. As a result, the financial autonomy of houses in this environment is low. Conversely, a combination of high-density opera availability and large-capacity theatres is associated with better financial autonomy. This may be explained by the lower level of competition, which makes high ticket prices possible, and economies of scale due to the size of the theatres, which reduces the average cost per ticket.

The physical capacity is an environmental factor, in that it cannot be changed or manipulated in the short or medium term by the opera's management. The size of opera houses is often a historical given.

The area with the greatest number of large theatres is North America, and they are rarest in the German-speaking zone, Eastern Europe and Russia. Out of 25 theatres with a capacity of over 2,000 seats, 15 are American and 1 is Canadian. In the intermediate group of theatres with a capacity of 1,300–2,000 seats, only one is in North America and the rest are all located in Europe. Sixteen theatres have a capacity of less than 1,300 seats, and nine of these are in the German-speaking zone. The European countries other than the German-speaking zone occupy an intermediate position, with greater size diversity and large theatres in the major cities such as Barcelona, London and Paris. On Table 1.6, opera houses are classified according to their physical capacity.

Table 1.6 Theatre size or physical capacity in seats number

Over 2,000 seats	1,300–2,000 seats	Less than 1,300 seats
New York City Met. Opera	Berlin Deutsche	Düsseldorf/Duisbourg
Chicago Lyric	Warsaw, Wielki	Graz
Dallas	Salt Lake City	Leipzig
Los Angeles	St Petersburg	Berlin Komische
San Francisco	Madrid Real	Toulouse
San Diego	Copenhagen	Brussels Monnaie
Seattle	Hamburg	Zurich
Montreal	Cardiff WNO	Moscow SN Dachencko
Vancouver	Amsterdam	Strasbourg
New York City Opera	Rome	Mannheim
Detroit	Turin Regio	Oslo
Houston	Leeds Opera North	Antwerp
Miami	Geneva	Bologna
London ENO	Aarhus	Rostov
Paris National Opéra	Naples	Nuremberg
Barcelona	Stuttgart	Prague Statni
Vienna Staatsoper	Berlin Staatsoper	Lausanne
London Royal Opera	Vienna Volksoper	Mainz
Moscow Bolschoï	Frankfurt	Athens
Santa Fe	Dresden	Tallinn
Munich	Lyon	Heidelberg
Washington	Helsinki	
Toronto	Colonge	
Milan Scala		
Paris Champs Elysées		

As we shall see, the theatre capacity is one of the factors explaining the differences between opera houses' financial performances (self-generated income, full cost) and physical performances (seat occupancy rates).

Financial and non-financial performances

Opera houses draw their financial resources directly from their activities through ticket sales, and indirectly from public and private funding, donations and sponsorship. Depending on the country, the local cultural policies and tax laws, and the missions and objectives assigned to opera houses, public funding may account for the majority or just a small portion of the financial resources. To simplify comparisons, we shall only analyse direct funding coming from box offices as a proportion of the total budget, calling this criterion "financial autonomy". Financial autonomy varies considerably as shown on Table 1.7, from more than 45 per cent in Chicago, Detroit and Zurich to less than 8 per cent in Ostrava, Leipzig and Frankfurt.

Table 1.7 Financial autonomy of opera houses

Over 30%	15–30%	Less than 15%
Chicago Lyric	Vienna Staatsoper	Brussels Monnaie
Detroit	Paris, Opéra National	Graz
Zurich	Lausanne	Berlin Staatsoper
Seattle	Dresden	Köln
New York City Opera	London ENO	Tallinn
London Royal Opera	Munich	Stuttgart
Montreal	Salt Lake City	Berlin Deutsche
Miami	Copenhagen	Nuremberg
San Diego	San Francisco	Mainz
Vancouver	Zuid	Athens
Toronto	Düsseldorf/Duisburg	Mannheim
New York Metropolitan	Rostov	Turin Regio
Los Angeles	Prague Statni	Rome
Dallas	Cardiff WNO	Warsaw, Wielki
Santa Fe	Hamburg	Berlin Komische
Geneva	Amsterdam	Heidelberg
Barcelona	Aarhus	Lyon
Houston	Helsinki	Frankfurt, Städt. Bühnen
Madrid Real	Leeds Opera North	Oslo
	Vienna Volksoper	Leipzig
	Washington	Ostrava

Note: Measured by the ratio: box office divided by total income.

North American opera houses generally have much higher financial autonomy than opera houses in the German-speaking zone. Zurich and Washington appear to be exceptions to this rule. Ticket prices, being exceptionally high in Zurich, may explain these apparent anomalies.

Financial autonomy is associated with the volume effects of theatre size, production volume and physical capacity, and the more directly financial effects of ticket prices and costs, and the cost of performances.

The number of performances appears to exercise a complex influence on financial autonomy, which is high in opera houses that put on a relatively low number of performances in large, well-filled theatres. The decline in financial autonomy appears to be due to smaller capacities and lower occupancy rates.

All other things being equal, financial autonomy is measured as the ratio between the ticket price and the average cost per ticket. The density of opera availability, which measures the intensity of competition in each opera house's catchment area, seems to influence ticket prices. When opera availability is low, or competition intensity is low, high ticket prices are possible and this contributes to good financial autonomy. However, good financial autonomy also results from lower costs per ticket, which could be due to volume effects or differences in the degree of adherence to both cultural and economic traditions.

At this stage, comparisons can only be based on full costs per season, adjusted to give the average full cost per ticket sold or per performance.

For the average full cost per ticket sold, three groups of opera houses are identified on Table 1.8: a group with average cost per ticket of over €300, another with average cost per ticket of €200–300 and a third with average cost per ticket of below €200.

German opera houses dominate in the left-hand column, while the right-hand column has a high proportion of American opera houses, apparently due to their higher seating capacity.

Although the average cost per ticket is apparently higher than in opera houses staging more new productions, the production volume has no noticeable effect on this parameter, and the physical capacity is the factor that best explains differences in cost.

For the cost per performance, three groups are also identified and presented on Table 1.9: opera houses with respective costs per performance of over €300,000, between 200,000 and €300,000, and under €200,000.

While the average cost per ticket is lowest in North America, particularly because of higher physical capacities, the average cost per

Table 1.8 Distribution of opera houses by full cost per ticket

Over €300	€200–300	Under €200
Heidelberg	Lyon	München, Staatsoper
Athens	Berlin Staatsoper	Seattle
Leipzig	Washington	London Royal Opera
Rome	Madrid Real	Düsseldorf/Duisburg
Oslo	Berlin Deutsche	Wien Volksoper
Salt Lake City	San Diego	Cardiff WNO
Nuremberg	Barcelona	Wien Staatsoper
Mainz	Detroit	Dallas
Stuttgart	San Francisco	Chicago
Köln	Houston	New York City Opera
Mannheim	Hamburg	Miami
Frankfurt, Städt. Bühnen	Lausanne	Prague Statni
Geneva	New York Metropolitan	Graz
Zurich	Aarhus	Tallinn
Berlin Komische	Santa Fe	Warsaw, Wielki
Brussels Monnaie	Dresden	Toronto
Helsinki	Amsterdam	Vancouver
	London ENO	Montreal
	Leeds Opera North	Rostov
	Los Angeles	

Note: In descending order in each column.

performance is higher in North America than in the German-speaking zone. These differences could be explained by the repertory policy of German opera houses, which present a large number of productions including a sizeable share of productions that are performed over several seasons.

The cost per performance is inversely related to the number of productions, performances and old productions. An economy of scale can be observed at the level of productions and performances, but this cannot guarantee low ticket prices. It is the auditorium capacity and occupancy rate that bring down the costs per ticket sold.

Paradoxically, the largest theatres achieve the best occupancy rates. What is more, it is the theatres with the highest priced tickets that fill the most seats. The positive effect of large seat numbers on income is amplified in two ways: a good occupancy rate and a high ticket price. The financial indicator consisting of the physical capacity multiplied by the occupancy rate and the average ticket price should be higher for higher-capacity theatres. This hypothesis is strongly supported by the observations, but is contrary to economic laws and intuition, and

Table 1.9 Distribution of opera houses by full cost per performance

Over €300,000	€200,000–300,000	Under €200,000
New York Metropolitan	Dallas	Zurich
Salt Lake City	London Royal Opera	Berlin Deutsche
San Diego	Munich	Nürnberg
Rome	Vienna Staatsoper	Helsinki
Paris, Opéra National	Lyon	Dresden Semperoper
San Francisco	Brussels Monnaie	Aahrus
Los Angeles	Miami	Heidelberg
Chicago	Cologne	Toronto
Washington	Mannheim	Warsaw, Wielki
Barcelona	London ENO	Cardiff WNO
Leipzig	Hamburg	Düsseldorf/Duisburg
Oslo	Amsterdam	Berlin Komische
Seattle	Frankfurt	Wien Volksoper
Houston	Berlin Staatsoper	Montreal
Stuttgart Staatsoper	Athens	Leeds Opera North
Geneva	Mainz	Lausanne
Madrid Real	Vancouver	Graz
Santa Fe	New York City Opera	Prague Statni
Detroit		Tallinn
		Rostov

Note: In descending order in each column.

requires further analysis. The geography of occupancy rates offers one possible explanation.

Although there are many exceptions to the rule, the North American opera houses seem to benefit from better occupancy rates than houses in the German-speaking zone. This could be due to higher-density opera on offer, which can explain both high prices and good occupancy rates. However, this explanation cannot account for the high occupancy rates observed in a large number of European opera houses.

The artistic policy, and the choice of operas and artists, can apparently attract audiences to large theatres despite high ticket prices. This does not seem to apply to programming, as both the best and least-filled theatres are those with the lowest alignment with the classics, and the highest percentage of contemporary operas. However, guest artist fame appears to be correlated with the seat occupancy rate.

A complex network of links between the key figures

A synthesis of all these observations is needed. Based on the figures, we propose an initial list of conjectures, which will be revisited in the

following chapters, and enhanced by the conclusions of our discussions with the general managers and staff of many opera houses. Additional statistical analyses are presented in the following chapter.

Ten conjectures

1. The opera houses with the most innovative programming put on more new productions and fewer revivals of past productions than the more conventional houses, in smaller-capacity theatres. Meanwhile, the most conventional opera houses have the greatest financial autonomy and the lowest average costs per ticket.
2. The opera houses that put on the greatest number of contemporary works present local works in small theatres with high costs per ticket. Conversely, the least modern programming is by opera houses in locations with low opera availability, large physical capacity and low costs per ticket.
3. Casting famous artists increases the houses' financial autonomy.
4. Casting famous artists increases the seat occupancy rate.
5. In areas with high opera availability and a longstanding tradition of opera, opera houses are small and put on a large number of performances.
6. The cost per performance is inversely related to the number of productions, performances and revivals.
7. Network style production mostly concerns medium-sized houses.
8. A high production volume is associated with low financial autonomy.
9. Greater theatre capacity increases internally generated income, reduces the full costs per ticket sold and improves the seat occupancy rate.
10. Financial autonomy is high in opera houses that put on a relatively low number of performances in large, well-filled theatres.

Some of these conjectures are consistent with intuition or generally accepted theories. Hardly surprisingly, economies of scale explain the reduction of costs per performance achieved through a higher number

of performances, and the fact that the cost per ticket is inversely proportional to auditorium capacity. But while it is easy to accept that greater capacity increases box office income, it may appear paradoxical that the largest theatres have the best seat occupancy rates, or that financial autonomy decreases when the number of performances increases.

These conjectures form the basis for a model in which the financial performance of opera houses can perhaps be explained by the artistic policies applied: the choice of works and artists; the production policies: number of productions and performances, revivals or new productions, alternation of operas, purchases and rental of productions; characteristics of the local environment: theatre capacity, density of opera availability, the length of the operatic tradition and the degree to which it is rooted in local culture, and local economic conditions.

3. A “German” model and an “American” model

Separate geographical groups emerge from the comparisons established, and two can be contrasted point by point: Germany (to which we attach Austria and the north of Switzerland) and the USA (to which we attach Canada). We refer to the “German” and “American” models not for linguistic simplicity but because the opera houses observed have several common features.

The environmental factors clearly differentiate North America from Germany and the German-speaking world.

Compared to Germany, North America has theatres that are on average twice as large, a very limited offering in relation to the potential audience for opera, and a less pervasive operatic tradition. The economic performances of the American opera houses in our sample are spectacular. Expressed as a percentage, they draw twice as many resources from ticket sales as their German counterparts, and achieve much higher seat occupancy for their vast theatres.

In terms of production policy, opera houses in Eastern Europe put on similar numbers of productions and performances to houses in Germany, Austria and Switzerland. This suggests that the German model has spread extensively eastwards. The average production volume is noticeably lower in North America. Co-productions are more common in North America and the rest of Europe than in the German-speaking zone.

Regarding programming, alignment with the international classics is lowest across all of Western Europe, which is also the zone where the most contemporary works are presented. Programming at the European

Table 1.10 The two dominant models

The “American” model	The “German” model
Large, well-filled theatres	Small theatres with low occupancy rates
Low volume of operatic activities, few operas, few old productions and many co-productions	High volume of operatic activities, large number of operas, many old productions and few co-productions
High ticket prices combined with low cost per ticket provide good financial autonomy	Relatively low ticket prices combined with high cost per ticket lead to high dependency on external funding
Relatively conservative programming	More innovative programming

opera houses appears to be more innovative than in the North American houses, which have the lowest score for performances of contemporary operas. The differences in guest artist fame are not significant.

From the diversity and apparent disorder in opera worldwide, two strongly identified models emerge that contrast in every way: the American model and the German model which characteristics are presented on Table 1.10 and 1.14, and between the two, many innovations in less clear-cut locations. Both models are visible in the German-speaking zone, and to varying degrees in neighbouring geographical zones such as Eastern Europe and Northern Europe.

The Los Angeles Opera and the Berlin Staatsoper Unter der Linden

In almost every aspect, the Los Angeles Opera and the Berlin Staatsoper Unter der Linden are perfect representatives of the two dominant models. Both are directed or influenced by prestigious musicians – Plácido Domingo in Los Angeles and Daniel Barenboim in Berlin – and both have a high reputation for artistic quality. They are differentiated by their history and geography. The Los Angeles Opera is 20 years old, while the Berlin Staatsoper has existed for more than two and half centuries.

In 1741 Friedrich II ordered construction of the *Hofoper*– court theatre – which was to receive the title of Staatsoper Unter den Linden in 1918. Over the next two and a half centuries, the most prestigious creations and the most distinguished artists would be seen there.

Among its musical achievements are the creation in 1821 of Weber’s opera *Der Freischütz* with sets designed by Gropius, and the creation of the *Merry Wives of Windsor* conducted by its composer Otto Nicolai in 1849. Richard Strauss conducted most of his works there during his directorship from 1899 to 1913. Nearer to our own times, Alban Berg’s

Wozzek was created there in 1925 by conductor Erich Kleiber, who also conducted the premiere of Darius Milhaud's *Christopher Columbus* in 1930 and symphonic pieces from *Lulu* in 1934. Otto Klemperer, Bruno Walter, Alexander von Zemlinsky and Fritz Busch were among the conductors associated with the Staatsoper. Herbert von Karajan became its musical director between 1941 and 1945. During the Second World War, the house burnt twice and had to be totally rebuilt. Wilhelm Furtwängler reopened the opera house in 1955 with Wagner's *Meistersinger*.

Such an opera house has a soul, a tradition and values built up over a long period and upheld despite the many ups and downs of history. Along with others, it has contributed to the development of an operatic tradition that is part of our human heritage. It still has a close connection with its audiences that comes from the experiences accumulated over the centuries. It is part of today's Staatsoper's invisible but extremely strong assets.

In comparison to this venerable, prestigious institution, the Los Angeles Opera is still in its infancy with though a bright opera activity today. Succeeding to some previous institutional initiatives after 1945, it opened in October 1986 with Verdi's *Othello* and Plácido Domingo singing the title role. Its venue is the Dorothy Chandler Pavilion in the Music Center of Los Angeles County, opened in 1964, which houses three other theatres. No tradition has been constructed over the long history of opera in this location. The Los Angeles Opera is a recent offshoot growing in new ground. History has not made its potential audience familiar with opera; this means it must start from scratch, but that almost anything is possible.

There are no constraints of history on the Los Angeles Opera like those affecting the Berlin Staatsoper. Protection of architectural assets is not an issue. The Dorothy Chandler Pavilion auditorium has 3,086 seats compared to the unchangeable 1,396 seats at the Staatsoper, there is no sacrosanct repertory, and there is considerable freedom for programming and presentation of externally prepared productions. Two opera houses, two cultures and two strategies: in Berlin a cultural institution maintains a long-established operatic tradition in its musical dimension; in Los Angeles a performing arts company promotes opera in a world capital city of contemporary arts and entertainment.

The statistics presented on Table 1.11 express and reflect these differences.

Being highly dependent on external funding, the Staatsoper receives the additional resources necessary from public sources. Traditions inspire the objectives of its cultural policy: a "repertory" system, low

Table 1.11 A “cultural institution” and a “performing arts company”

(2006–07 data)	Berlin Staatsoper	Los Angeles Opera	Comments
Number of productions	31	10	Including 5 co-productions
Number of performances	154	75	
Number of co-productions	22	15	Measured by the number of performances of co-productions or rented productions
Number of rented productions	–	28	
Physical capacity	1,396	3,086	
Cost per performance	310,000	606,000	In euros
Cost per ticket	275	202	
Ticket price	52	114	
Seat occupancy rate	81%	94%	
Financial autonomy	14%	38%	

ticket prices, despite significant increases, diversified pricing policy since 2005 and high production volumes. The Los Angeles Opera, in contrast, has no public funding and must carry out an aggressive sales policy to attract, build loyalty in and involve a broad, wealthy audience. The leading roles are played by star artists. Placido Domingo acts both as its general manager and as a prestigious singer. Thanks to his personality and to his world reputation, he plays a considerable role to attract donors. James Conlon as well known in Europe as in the USA is the music director. During the 2006–07 season, it was possible to enjoy Renée Fleming and Rolando Villazon in *La Traviata*, and Anna Netrebko in *Manon*. The Los Angeles Opera is developing a positive image of quality and energy with which “business partners” are willing to associate their name, reputation and communication. Those partners include financiers such as the Bank of America alongside industrial companies like Audi, Boeing, Nissan, Northrop Grumman and Henri Wine Group, or companies connected to music, such as Kawai and EMI Classics.¹²

In a slightly exaggerated nutshell, it could be said that the management of Los Angeles Opera has to satisfy its audience expectations and the demands of its business partners, while the management of Berlin Staatsoper has to manage its artistic policy within the budget constraints locally defined by the foundation responsible for the three Berlin opera houses.¹³ In short, we face up to a point the new world and the old Europe!

European innovative operas

All operas do not correspond to these two models, which act as “strange attractors” on opera houses located outside the relevant zones. “American” type houses can be found in the German-speaking zone: Baden-Baden and Zurich, for example; “German” type institutions are scarce in North America. The Utah symphony and Opera received a bit less than 20 per cent of its total budget in 2006–07. Instead of submitting to the conditions of their local environment, these houses adopt strategies that are used in other environments. There are also innovative opera houses that seek to adapt the game rules of operatic activity to their benefit. There are many of these in Europe: the Royal Opera House in London and Welsh National Opera (WNO) in Cardiff, Amsterdam and La Monnaie in Brussels, Barcelona and Madrid. Among these innovators, the Liceu in Barcelona and Cardiff WNO stand out, respectively for a network strategy and a touring strategy.

Barcelona’s Gran Teatre del Liceu presents itself as a place for creation, exchange and resource sharing. Productions, sets, costumes and props, as well as the theatre spaces: everything can be purchased, sold or shared. The 2008–09 season is a spectacular example. As shown on Table 1.12, just two operas of the ten to be performed during the season

Table 1.12 The Gran Teatre del Liceu at the centre of an exchange network

Opera	Co-production with:	Rented from:	Purchased from:
<i>Tiefland</i>			Zurich
<i>The Marriage of Figaro</i>	Cardiff		
<i>Simon Boccanegra</i>	Geneva		
<i>The Mastersingers of Nuremberg</i>			Dresden
<i>La cabeza del Bautista</i>	Halle		
<i>Fidelio</i>			New York Met. Opera
<i>Salomé</i>	Brussels Monnaie		
<i>Turandot</i>	ABAO Bilbao		
<i>La favourite</i>		Montpellier	
<i>Ariadne auf Naxos</i>		ABAO Bilbao	
<i>L'enfant et les sortilèges</i>		Las Palmas	
<i>La Cenerentola</i>		Brussels Monnaie	
<i>Giulio Cesare</i>		Séville	

are neither co-productions nor rented productions from another opera house.

The WNO based in Cardiff has made its vocation to take opera to many towns in Wales, the UK and abroad. In contrast to the Berlin Staatsoper, it only puts on a limited number of works, but performs them in a large number of theatres. Like the Liceu in Barcelona, it co-produces or purchases most of its productions. Its programming for 2008–09 is a good illustration of this unusual policy (see Table 1.13): eight productions comprising three new productions, five co-productions and one purchased production. These productions are performed in ten theatres: 23 performances in Cardiff and 70 on tour with frequent alternations between operas in each town visited, so that every visit by the WNO is perceived as a festival.

These two innovative opera houses have both increased their audiences, and thus their income, and reduced their costs through

Table 1.13 Cardiff WNO or opera on tour

Opera	Co-production with:	Purchased from:	Performed in:
<i>Othello</i>			Cardiff (5), Swansea (1), Liverpool (1), Bristol (2), Southampton (2), Birmingham (2), Llandudno (2), Oxford (2)
<i>The Barber of Sivilgia</i>	Opera North, Vancouver		Cardiff (4), Swansea (2), Liverpool (2), Bristol (2), Southampton (2), Birmingham (2), Llandudno (2), Oxford (2)
<i>Jenufa</i>	Genève		Cardiff (2), Liverpool (1), Bristol(1), Southampton (1), Birmingham (1), Llandudno (1), Oxford (1)
<i>The Marriage of Figaro</i>	Liceu Barcelone		Cardiff (6), Swansea (2), Bristol (2), Southampton (2), Birmingham (2), Llandudno (2), Plymouth (2), Milton Keynes (2)
<i>L'Elisir d'Amore</i>		Opera North	Cardiff (4), Swansea (1), Bristol (2), Southampton (2), Birmingham (2), Llandudno (2), Plymouth (2), Milton Keynes (2)

Table 1.13 (Continued)

Opera	Co-production with:	Purchased from:	Performed in:
<i>Salomé</i>	Scottish National Opera		Cardiff (2), Swansea (1), Bristol (1), Southampton (1), Birmingham (1), Llandudno (1), Plymouth (1), Milton Keynes (1)
<i>The Queen of Spades</i>	Den Norske Opera, Bologna		Cardiff (4), Birmingham (1)
<i>La Bohème</i>			Cardiff (5), Birmingham (3)

co-productions. Barcelona shares and distributes a portfolio of resources. Cardiff does the same, but also leaves its home building in search of audiences. Of course, these are not the only innovative opera houses, but they are good illustrations of the strategies involving opening up to the production and distribution networks that are developing all over the world.

Table 1.14 A comparison of the German and the American models along this book's dimensions, from contributions of Marc A. Scorca with Kelly Rourke, and Prof. Gerd Uecker (see notes 14 and 15, p. 283)

The German model	The American model
<p><i>Origins and development</i> As early as the middle of the 16th century, courts or Kapelle orchestras are set up. They progressively become the backbone of today's German Musiktheater and opera houses. When Germany becomes a unified country, at the end of the 19th century, the cities and Länder pursue the same policies.</p> <p>In a continuously favourable environment, opera houses develop in Germany throughout the 19th and 20th centuries. Many of them enjoy a world reputation as early as the end of the 19th century.</p>	<p><i>Origins and development</i> From the end of the 18th century, European opera singers and impresarios visit North America, and present the newly composed operas of Europe. In 1820, Lorenzo da Ponte helps introduce to New York Rossini's and Mozart's operas.</p> <p>Throughout the 19th and 20th centuries, touring is very active. The first opera houses and companies are set up at the end of the 19th century (Metropolitan Opera of New York in 1883).</p> <p>The real boom in American opera came after the Second World War.</p>

Macroeconomics

With a total annual turnover of €2,400 millions, 6,600 performances and 5 million tickets sold per season, the area is the most concentrated in the opera world. Average audience per performance is about 760. With approximately the same total audience as American ones, German houses perform three times as often before audiences that are three times smaller and auditoriums three times smaller.

Production model

Most German houses are based on the so-called repertory model, that is, presenting a number of titles over 15 and up to 40 with often more than 150 performances a year and sometimes up to 200.

Main professional, organizational and cultural features

Opera houses are most often part of integrated artistic activities, with ballet, concerts, and sometimes operetta and musicals. They sometimes share the same theatres with the spoken theatre (*schausspiel*). Links between opera and theatre activities and professionals are extremely strong through shared structures of Musiktheater. Music, opera, ballet and theatre are part of a cultural tradition probably unique in the world, given not only the number of performances, productions and theatres, but also the place of German and Austrian opera composers.

An active mobility exists between the theatre and the opera worlds. Many German *Intendants* are former stage directors (*regisseur*). This is partly the origin of the so-called movement *regie theater*.

Today, more than a century after the founding of the Metropolitan Opera, every state in the country boasts at least one opera company.

Macroeconomics

The total annual turnover is about €700 million for 2,300 performances and 4.3 million tickets sold. Houses are highly concentrated since 20 per cent of houses account for 75 per cent of the total audience.

Production model

Except for the New York Metropolitan Opera, which is the largest opera house in the world through its audience and number of performances, opera houses and companies have adopted a *stagione* model, that is between one or two and ten titles a year, and a maximum of 80 performances.

Main professional, organizational and cultural features

Today, opera houses and companies are specialized in opera production and performances. Until the late 1950s, some of them also ran ballet activities, such as the New York Metropolitan Opera. In the past, the bigger American opera houses or companies practised touring on large scales. Institutional links between opera and theatre are not as strong as in Germany. Most often, American opera houses do not possess their theatres but use existing venues.

A consistent theatrical dimension is part of opera performance requirements. American and non American cinema and theatre stage directors are often asked to stage opera productions, from Franco Zeffirelli and Luc Bondy to Woody Allen.

Table 1.14 (Continued)

The German model	The American model
<p><i>Artistic resources and young singers training</i></p> <p>In coherence with their operating model, German opera houses do benefit from their own permanent artistic resources: orchestras, choruses and in-house singers.</p> <p>German opera houses are unique as they actively manage permanent ensembles of singers.</p> <p>The best young singers of the world know that they can learn and experience in their art.</p> <p>The attractiveness of German opera houses' ensembles is high all over the world, especially in Asian countries.</p>	<p><i>Artistic resources and young singers training</i></p> <p>American opera houses and companies, equally coherent with their operating model have a level of flexibility that enables management to adjust, at least somewhat, to external conditions by hiring the people they need when they need them.</p> <p>In a totally different way from the German opera houses, American opera houses are also active and successful in young singers training. Many opera houses or companies set up seasonal training centres enjoying targeted private donations. Many world-known singers have been trained in these centres. During the 1950s and 1960s, the USA exported many American singers to Europe. While the USA could boast about a wealth of training centers and conservatories, the country did not yet have enough opera companies to help aspiring singers make the transition from student to professional. American singers had to go to Europe to gain experience, and many of them stayed there.</p>
<p><i>Funding</i></p> <p>As an average, public subsidies fund the German opera houses by 80 per cent. Box office and earned revenues are on average between 10 per cent and 20 per cent.</p> <p>A few German opera houses escape such an important share of public funding, and rely on earned revenues like the larger European opera houses (Munich, Dresden).</p>	<p>Year-round and summer programmes offer performance experience as well as advanced coaching in language, interpretation and stage movement. Today, virtually every important opera company has a programme for emerging artists, and a commitment to engaging the most promising American singers.</p>
<p><i>Main financial constraints</i></p> <p>Each German Musiktheater depends on its city or Länd or both for its funding through public subsidies. Each city or Länd defines its own policy: public funding of opera houses and more widely of musical events and theatres does not obey any national rule.</p>	<p><i>Funding</i></p> <p>Private donors fund opera houses and companies by more than 40 per cent. The box office revenues represent 38 per cent. Other earned revenues complement the funding. Government and public money are not more than 2 per cent.</p>
<p>Quite the opposite, working agreements are negotiated on a national basis either by the Deutscher Bühnenverein for artists</p>	

or by the well-known German union VERD.I for technical and administrative salaried employees of cities or Länder working in cities or Länder-owned opera house theatres.

Costs derived from working agreements sometimes grow much faster than public subsidies.

The future of German opera houses is mostly dependent on the evolution of public subsidies.

Main financial constraints

Each American opera house and company is totally dependent on its ownership for its contributed revenue and on its public for box office and earned revenue.

Opera houses and companies are extremely sensitive to economic or financial crises.

Opera houses' history in America shows that many of them have disappeared and sometimes reappeared given the need felt for opera and the occasional motivation of private donors. The larger number of opera houses and companies are small in size. Working agreements lead to financial constraints as in any European country. Areas of negotiations are often regional.

Reactivity and flexibility is high in periods of turmoil towards reducing costs and activities, but also occasionally reinforcing the donor's financial commitments.

Conclusion: order, diversity or confusion?

At the end of this chapter, have we brought order to the highly diverse world of opera houses and companies? Or have we instead created more confusion?

Opera is a major art form which has developed right across the planet through the centuries, imposing common rules and values. Wherever they are located, the institutions that present operas play an eminent role in the reputation of their local communities. The operatic tradition of artistic quality is respected everywhere. International classics go hand in hand with exchanges of productions and artists. Problems of funding for this complex activity are common to all opera houses.

2

Programming: Risk and Commitment for the Future

When Stéphane Lissner decided to stage Franco Alfano's *Cyrano de Bergerac* at La Scala in Milan for the 2007–08 season, he chose an Italian opera that had sunk into oblivion since its creation in 1936, but which he helped to revive with the New York Metropolitan Opera and the London Royal Opera House in a co-production directed by Francesca Zambello and starring Plácido Domingo in the title role. This decision was in line with the principles clearly declared by La Scala's Sovrintendente: to programme at least 50 per cent of Italian operas and bring together world-famous artists (conductors, singers, directors) to return today's La Scala to its past heights of quality. It was a risky decision, but the risk was limited in several ways. This was a co-production with two of the greatest opera houses, Francesca Zambello's productions are successful all over the world, Patrick Fournillier is one of the most sought-after guest conductors and, essentially, Plácido Domingo was in the cast. He may well have been the originator of the idea. He was a triumph in the role, demonstrating acting and singing talents still unequalled by many younger tenors. The press coverage reflected the success of the venture. In the words of a London critic, "The opera stands or falls on the performance of the tenor singing *Cyrano*, and in this respect Domingo is the production's greatest asset It isn't a great opera, but it was a great performance where it mattered – the title role!" And in Milan one commentator wrote, "*Alfano's Cyrano de Bergerac* is an expressive, at times jarringly sad masterpiece, which we can all thank Maestro Domingo for exhuming from obscurity." The opera was a sell-out in all three theatres. The Théâtre du Châtelet staged the same opera in Paris in May 2009, also with Plácido Domingo and Patrick Fournillier, but in a production staged by Petrika Ionesco and a partnership with the Spanish Province of Navarre and its Symphonic Orchestra.

Some general ideas can be inferred from this specific example: programming decisions are strategic, and originate with the opera houses' general management. Programming is a long-term process defining an opera house's activities over several years: at least 6 years elapsed between the initial decision to stage this co-production and its première in Milan. It involves commitments to external partners (New York Metropolitan Opera, Covent Garden and all the artists); it is closely related to decisions on the mode of production (co-production in this case) and the choice of guest artists (Patrick Fournillier, Francesca Zambello and Plácido Domingo) as guarantees of quality and risk reduction factors. This requires a capacity for forward planning and ongoing commitment that does not combine at all with management instability, lack of policy continuity or low visibility over financial commitments by strategic partners such as public bodies or the most important sponsors. The conditions governing programming decisions involve multi-year commitments by opera houses and the bodies that have authority over them. An opera house cannot be managed over a short, one-year or one-season horizon.

Programming is a risky process. Programming over a multi-year horizon involves risks related to the audience and resources. In a worst case scenario, the public authorities might scale down their subsidies for programmes considered "too commercial", sponsors might make their donations conditional on the popularity of the proposed operas and most of all audiences might stay away from innovative or seldom-seen works. To reduce these risks, opera houses adopt strategies to balance their programming across the whole season, or to offset the risks taken by guarantees in other aspects of their artistic policy, particularly the choice of the leading artists.

Programming prepares for the future without forgetting the past. The past is the repertory, or productions first staged in previous seasons and still available for further performances, either in the original theatre or to be rented or purchased by other theatres. The German repertory-based opera houses draw additional value from their productions by performing them in more than one season, either in their own theatres or other opera houses. They thus preserve and promote the masterpieces of the past, and cautiously experiment by occasionally adding new operas to the repertory. Their programming strikes a balance between performances of operas already in the repertory and productions of new works, between the past and the future, between preservation of the operatic heritage and new creations.

This chapter discusses these issues with illustrative examples.

1. Opera house programming

Which works do opera houses offer? Do their choices result in them converging towards a limited repertory? Is the repertory broadening with creations of new operas or rediscoveries of old operas? How much room are contemporary operas given in the programmes? Do the major periods of opera or locally composed works tend to be over-represented? These are the questions we attempt to answer in respect of programming.

Do opera houses tend to conform to the standard classics?

The evidence is unambiguous: a strong concentration on the most popular operas can be observed all over the world. In the JMB Travel database,¹ the programmes of the world's principal opera houses offer 509 operas in 4,628 performances. Nearly three quarters of those operas were composed by the ten composers shown in Table 2.1. Just four of them – Mozart, Verdi, Puccini and Wagner – were behind more than half the opera performances in the world.

Of the 509 operas listed in the JMB database, just 27, the most frequently performed, account for more than 50 per cent of all performances.

Our own sample of opera houses gives similar results. Of the 336 works performed in opera houses during the 2006–07 season, the 37 most frequently staged accounted for 50 per cent of the total 6,394 performances. There is clearly a concentration of opera offering a small

Table 2.1 The ten most performed opera composers in the world

Composer	Number of performances	% of performances	Cumulative % of performances
Mozart	769	18.02	18.02
Verdi	708	16.59	34.61
Puccini	485	11.36	45.97
Wagner	267	6.26	52.23
Rossini	227	5.32	57.54
Donizetti	198	4.64	62.18
Strauss R.	157	3.68	65.86
Bizet	127	2.95	68.82
Janacek	197	2.51	71.32
Handel	94	2.20	73.52

Source: <http://www.jmb-travel.co.uk>.

Table 2.2 The “top twenty” titles (in descending order of the number of performances)

<i>La Traviata</i>	<i>Nabucco</i>	<i>La Traviata</i>	<i>Turandot</i>
<i>Tosca</i>	<i>Madame Butterfly</i>	<i>Tosca</i>	<i>Eugene Onegin</i>
<i>Aïda</i>	<i>Turandot</i>	<i>Don Giovanni</i>	<i>Simon Boccanegra</i>
<i>The Magic Flute</i>	<i>Rigoletto</i>	<i>Carmen</i>	<i>Nabucco</i>
<i>The Marriage of Figaro</i>	<i>Manon Lescaut</i>	<i>Madame Butterfly</i>	<i>L'elisir d'amore</i>
<i>Carmen</i>	<i>Don Giovanni</i>	<i>The Marriage of Figaro</i>	<i>The Tales of Hoffmann</i>
<i>The Barber of Seville</i>	<i>The Tales of Hoffmann</i>	<i>The Barber of Seville</i>	<i>Rigoletto</i>
<i>La Bohème</i>	<i>Cavalliera Rusticana/Pagliacci</i>	<i>Così fan tutte</i>	<i>Die Fledermaus</i>
<i>Così fan tutte</i>	<i>Der Rosenkavalier</i>	<i>La Bohème</i>	<i>Lucia di Lammermoor</i>
<i>Lucia di Lammermoor</i>	<i>La fille du régiment</i>	<i>The Magic Flute</i>	<i>Aïda</i>

Source: <http://www.jmb-travel.co.uk>; our statistical analysis sample.

number of works: 50 per cent of opera performances are concentrated on 11 per cent of the works staged. Although the two “top twenty” lists in Table 2.2 are from different sources, 16 titles are common to both lists.

What is true for one season is also true across a long period at a given opera house.

Considering all the operas staged since its opening in 1883, the New York Metropolitan Opera has put on nearly 27,000 performances. The ten most frequently performed works account for almost a third of that total, and eight of them are in the “top ten” for the 2006–07 season (Table 2.3). It is interesting to observe that Italian composers clearly predominate in the top ten, Wagner has a strong presence in the next ten, and works by Mozart are relatively scarce compared to the international classics.

During the 1998–2003 period, the six more frequently performed operas by the Opéra National de Paris in both its Bastille and Garnier theatres account for 30 per cent of its opera box office revenue. In descending order of box office income, those operas are *Carmen*, *Tosca*, *La Bohème*, *The Marriage of Figaro*, *The Magic Flute* and *Faust*, all composed in the 18th and 19th centuries. The situation at the Metropolitan Opera is comparable. Seven operas account for 30 per cent of performances, and probably a higher proportion of income. They are, in order, *La Bohème*, *Carmen*, *Turandot*, *Tosca*, *Aïda*, *Madame Butterfly* and

Table 2.3 The “top twenty” at the New York Metropolitan Opera (1883–2008)

<i>La Bohème</i>	<i>Lohengrin</i>
<i>Aida</i>	<i>Il Trovatore</i>
<i>Carmen</i>	<i>The Barber of Seville</i>
<i>La Traviata</i>	<i>Lucia di Lammermoor</i>
<i>Tosca</i>	<i>Die Walküre</i>
<i>Madame Butterfly</i>	<i>Don Giovanni</i>
<i>Rigoletto</i>	<i>Tannhäuser</i>
<i>Faust</i>	<i>Tristan und Isolde</i>
<i>Pagliacci</i>	<i>The Marriage of Figaro</i>
<i>Cavalliera Rusticana</i>	<i>Die Meistersinger</i>

Note: In decreasing order of the number of performances from 1,200 for *La Bohème* to 408 for *Die Meistersinger*.

La Traviata, all dating from the second half of the 19th century. At the Vienna Staatsoper, the German operas by Mozart, Offenbach, Richard Strauss and Wagner share the stage with two 19th-century Italian composers, Verdi and Puccini. The seven works performed most frequently, namely *The Magic Flute*, *La Bohème*, *Der Rosenkavalier*, *Tosca*, *The Tales of Hoffmann*, *Tristan und Ysolde* and *Aida*, made up 30 per cent of performances, and similar situations are observed in New York and Paris. Bizet, Puccini and Mozart reign in Paris, Puccini, Bizet and Verdi are masters of New York, and Mozart, Richard Strauss and Puccini are the most performed composers in Vienna.

The demonstration is clear for the whole of planet opera: most opera performances concern a very small number of titles. How many? A few dozen, once a few obvious omissions are added to the two top twenty lists, including *Faust*, *Don Carlo* and other great works by Wagner, *Hansel and Gretel*, *Salome*, *Fidelio*, *Jenufa*, *Idomeneo*, *La Clemenza di Tito* and *Il Trovatore*.

The vast majority of the operas in current season programmes were composed in Italy (47 per cent) and Germany, or more generally the German-speaking zone (29 per cent). Three quarters of them were composed and first performed in the 19th century or first half of the 20th century. Earlier works, other than those by Mozart, have been rediscovered in the last 20 years but are still statistically among the “classics”. The most recently composed operas, on which renewal of operatic art depends, account for only 7 per cent of performances.

This situation requires explanation. The reasons underlying these choices seem to relate to finances and audience levels.

A balance based on financial and audience reasoning

In European opera houses, a new production needs to be performed 15–20 times across two or three seasons, with high seat occupancy rates in order to generate enough box office income to cover the whole of its variable costs. In large and very large theatres, only the most popular operas can expect to achieve this. Dominique Jameux (2004, p. 785) noted the confinement of the Paris National Opera to a small number of works with some bitterness. He observes over an eight-year period that only 24 operas have filled the 2,700 seats of the Bastille Opera eight times over and have been reperformed in at least one subsequent season, with an occupancy rate of more than 95 per cent at least once.² The economics of opera thus justifies the concentrated focus on the most popular works. This phenomenon is accentuated by auditorium size. The largest theatres stage more classics than the smallest, as seen in Chapter 1. The most popular and cheapest to produce operas are the most frequently performed. The best examples are *La Traviata*, *Tosca* and *Rigoletto*. *War and Peace* is attractive to audiences, but the production and cast costs are exorbitant. With balanced programming across a season, the box office income from popular, cheap to produce works enables the theatre to take risks on other titles. This results in a tacit but observable programming formula. In terms of the number of performances, 50 per cent will be risk-free and provide the core for the opera house's economic management, 20 per cent will be riskier productions of new, less accessible or more expensive operas, and between the two will be 30 per cent of well-known but more rarely seen operas.

Many exceptions to the average rule

Of course, this rule reflects an “average” statistical situation, and will not match the real-life opera houses practices in every time and place.

Take time first. Anniversaries of the great composers' births or deaths (Verdi in 2001, Mozart in 2005–06 and Puccini in 2008) and commemorations of significant events bring often forgotten works out of obscurity at the same time all over the world, in many cases for only a short-lived upturn in popularity. In the recent “Mozart year”, many rarely played operas such as *Bastien und Bastienne*, *La finta semplice*, *Lucio Silla* and *Zaide* were performed in public again for a brief period. In Germany, during the 2005–06 season devoted to Mozart, a million spectators or approximately one fourth of the entire audience of German opera houses attended 2,000 performances of works by Mozart. The commemorations doubled the usual audience levels for Mozart.

Then take place. Festivals, but also theatres with essentially themed programming such as Teatro Real in Madrid and Opéra de Lyon, will never be in line with average programming practices. For the 2008–09 season, the Teatro Real's programming was underpinned by the theme of temptation, with *The Rake's Progress*, *Faust-Bal*, *Tannhäuser*, *Scenes from Faust* and *The Damnation of Faust*. Such an approach has been considered important for the public, who are offered a theme to connect all the works and therefore give meaning to the season. In these cases, the selected themes are universal myths such as Faust and Orpheus. Lyon follows two approaches designed to make its programming clear and comprehensible to the audience. One theme is chosen per season and several operas are presented once a year in a festival, when they are performed alternately. The first Lyon festival in 2004–05 was on the theme of "Three Women", the second "Kurt Weil, from Berlin to Broadway", the third in 2006–07 celebrated Offenbach and the 2007–08 theme was on "The Night".

Finally, as described later, the specific programming touch of each opera house is to be found in the different balances of their seasons and in the choices of the non-classics opera titles they choose.

The large theatres, as we have seen, are obliged by necessity to have strictly balanced programming. Those that receive extensive public funding may be induced to strengthen their cultural mission to create and perform little-known or new operas. Those with extensive sponsorship income seek to develop a programme that will meet the box office income results they need. Do large theatres encourage a more conservative approach? By convention, we use the word "conservative" for opera houses whose programme for a whole season includes more than 50 per cent of performances of the most frequently performed works (that is, the classics listed in Table 1.1) or where the percentage of performances of contemporary operas, defined by convention as operas composed after 1950, is below 2 per cent compared to the overall average of 7 per cent.

A positive link is visible between the percentage of performances of classics and the auditorium size. While the average capacity of theatres where the classics account for less than 40 per cent of performances is 1,647 seats, the average for theatres where over 60 per cent of performances are of "classics" is 2,749.³ A similar relationship exists between modernism, or the percentage of performances concerning contemporary works, and the auditorium size. Opera houses where more than 10 per cent of performances are of contemporary operas have

an average capacity of 1,570 seats, while the average is 2,240 seats for theatres where less than 2 per cent of performances concern such works.⁴

Does conservative programming increase opera houses' financial autonomy? It is generally accepted that the most popular operas generate the highest income, thus helping to increase opera houses' financial autonomy. It certainly appears to be the case that the houses with the lowest financial autonomy are slightly more innovative than the rest. Across all theatres earning less than 15 per cent of their income from ticket sales, the classics account for an average 46 per cent of performances against to close to 52 per cent at other theatres. The difference is not spectacular.

Are there any geographical differences in programming? Naturally, geography cannot supply an explanation, but North American opera houses have practically no public funding whereas their counterparts in the rest of the world are dependent, in varying ways and to varying degrees, on public financing that can be presumed to be conditional on their programming choices. A comparison between North America and the rest of the world should shed light on the influence of public funding on programming (see Table 2.4).

Clearly more classics and fewer contemporary operas are staged in North America than the other parts of the world but here again no significant gap exists between North America and the rest of the world. The spread of contemporary opera would appear to be the factor most affected by lack of public funding. The differences in the average proportions of classics in programming remain modest. On both these points, we shall see that there are many exceptions to the "rules", with innovative opera houses in the USA and conservative houses in Europe and elsewhere.

National and regional preferences are also expressed through programming. In 2006 and 2007, five French composers – Poulenc, Bizet,

Table 2.4 The geography of programming

	% of performances of the classics	% of performances of contemporary operas
North America	53	3
German-speaking zone	45	6
Rest of the world	48	8

Berlioz, Ravel and Massenet, plus a sixth if we include Offenbach and *La Belle Hélène* – were responsible for the 20 most performed operas in France, alongside only one German-language composer, Mozart. In Germany, in the 2004–05 and 2005–06 seasons, only one French composer was on the list, Bizet, for *Carmen*. Mozart, Humperdinck, Wagner, and Weber were the composers of the vast majority of operas performed. The same observations could be made in Russia, even if Italian opera is very popular, or in Great Britain.

It is particularly applicable to creations of contemporary operas, which are generally first performed and scheduled in their country of origin. This is mainly explained by the fact that new works are generally commissioned by opera houses.

For the purposes of Table 2.5, a “contemporary opera” is an opera created after 1950 which was performed during the 2006–07 season in the sample of opera houses examined for the statistical analysis. Of the 59 recent creations shown in Table 2.5, 41 were first performed in the composer’s country. Even then, some of the exceptions, written in bold, are close to the rule. Philippe Boesmans’s opera was created in Paris by his compatriot Gérard Mortier, *Medea* was created in Paris where Rolf Liebermann has lived since he was general manager of the *Opéra National de Paris*. *J’étais dans ma maison et j’attendais*

Table 2.5 Contemporary operas and their place of creation

Title	Composer	Nationality	Created in
<i>Agleia Federweiss</i>	Gerd Kürh	Austrian	Graz
<i>Alice</i>	Sergio Rendine	Italian	Barcelona
<i>Anna Karenina</i>	David Carlson	American	Miami
<i>L’Autre Côté</i>	Bruno Mantovani	French	Strasbourg
<i>Brief Encounter</i>	André Prévin	American	Houston
<i>Caligula</i>	Detlev Glanert	German	Frankfurt
<i>Candide</i>	Leonard Bernstein	American	New York
<i>Cheryomushki</i>	Dmitri Shostakovich	Russian	Moscow
<i>Chief Joseph</i>	Hans Zender	German	Berlin
<i>Da gelo a gelo</i>	Salvatore Sciarrino	Italian	Paris
<i>De profundis</i>	Sergio Rendine	Italian	Rome
<i>Dead Man Walking</i>	Jake Heggie	American	San Francisco
<i>Der 35 Mai</i>	Violeta Dinescu	German	Mainz
<i>Doctor Atomic</i>	John Adams	American	San Francisco
<i>El Niño</i>	John Adams	American	San Francisco
<i>El viaje a Simorgh</i>	Jose Maria Sanchez-Verdu	Spanish	Madrid

<i>Elegy for Young Lovers</i>	Hanz Henze	German	Schwetzingen
<i>Faustus, the Last Night</i>	Pascal Dusapin	French	Berlin, Lyon
<i>Florencia en el Amazonas</i>	Daniel Catàn	Mexican	Houston
<i>Gaddafi</i>	Steve Chandra Savale	British	London ENO
<i>Hour of the Serpent</i>	Mikko Heiniö	Finnish	Helsinki
<i>Il dissoluto assolto</i>	Azio Corghi	Italian	Lisbon
<i>Il prigioniero</i>	Luigi Dellapiccola	Italian	Florence
<i>J'étais dans ma maison ...</i>	Jacques Lenot	French	Geneva
<i>Jeremy Fischer</i>	Isabelle Aboulker	French	Lyon
<i>Joseph is a Fruitful Bough</i>	Eriks Esenvalds	Lithuanian	Riga
<i>Kismet</i>	Robert Wright	American	New York
<i>L'Upupa</i>	Hans Henze	German	Salzburg, Berlin
<i>Last Temptations</i>	Jonas Kokkonen	Finnish	Helsinki
<i>Le grand macabre</i>	György Ligeti	Hungarian	Stockholm
<i>Luci mie traditrici</i>	Salvatore Sciarrino	Italian	Schwetzingen
<i>L'Uomo dal fiore in Bocca</i>	Luc Brewaeys	Belgian	Brussels
<i>Medea</i>	Rolf Liebermann	German	Paris
<i>Mein Freund Bunbury</i>	Gert Natschinsky	German	Leipzig
<i>Melusine</i>	Aribert Reimann	German	Bremen
<i>Miss Donnithorne's Maggot</i>	Peter Maxwell Davies	British	Adelaide
<i>Monkey Journey to the West</i>	Damon Albarn	British	Manchester
<i>Monsieur de Pourceaugnac</i>	Frank Martin	Swiss	Lausanne
<i>Owen Wingrave</i>	Benjamin Britten	British	London
<i>Ratsumies</i>	Aulis Sallinen	Finnish	Savonlinna
<i>Red Line</i>	Aulis Sallinen	Finnish	Helsinki
<i>Richard III</i>	Giorgio Battistelli	Italian	Anwtwerp
<i>Rotter</i>	Torsten Rasch	German	Cologne
<i>Satyagraha</i>	Philip Glass	American	Rotterdam
<i>Sophie's Choice</i>	Nicholas Maw	British	London ROH
<i>Tea</i>	Tan Dun	Chinese	Tokyo
<i>The Bird's Opera</i>	Janis Lusens	Lithuanian	Riga
<i>The Children of Rosenthal</i>	Leonid Decyatnikov	Russian	Moscow
<i>The First Emperor</i> ⁵	Tan Dun	Chinese	New York
<i>The Grapes of Wrath</i>	Ricky I. Gordon	American	Salt Lake City
<i>The Secret Song</i>	Elvis Costello	British	Copenhagen
<i>The Sound of Music</i>	Richard Rodgers	American	New York
<i>The Tempest</i>	Thomas Adès	British	London ROH
<i>The Temptation of Saint Anthony</i>	Bernice J. Reagon	American	Ruhr festival

Table 2.5 (Continued)

Title	Composer	Nationality	Created in
<i>The Turn of the Screw</i>	Benjamin Britten	British	Venice
<i>Wagner Dream</i>	Jonathan Harvey	British	Amsterdam
<i>Waiting for the Barbarians</i>	Philip Glass	American	Erfurt
<i>Wallenberg</i>	Erkki-Sven Tüür	Estonian	Tallinn
<i>Yvonne princesse de Bourgogne</i>	Philippe Boesmans	Belgian	Paris

que la pluie vienne from Jacques Lenot was premiered in Geneva in 2007, a French-speaking city, *Florençia en el Amazonas* by the Mexican Daniel Catàn was premiered in Houston in 1996, not far from the Mexican border.

Many of the contemporary works composed in North America are musicals that were successful on Broadway before being presented, with or without adaptation, in opera houses. The average number of performances per production is six, a similar figure to the average for all operas, which is explained by the large number of operettas and children's operas in this group of contemporary operas.

Generally, medium-sized to large theatres rather than "small" theatres commission or perform new operas because they possibly have more financial resources in this respect.

Programming reflects an artistic policy specific to each opera house

Beyond the universal concerns for resources and audience levels, and beyond concerns specific to groups of opera houses with similar funding sources, size or geography, programming expresses an artistic policy, and in this respect it defines the identity of an opera house.

The 2006–07 season programmes at the opera houses in our sample have been compared. The comparisons bring out opera houses that emphasize the "inevitable" classics and offer few contemporary works, such as the Prague Statni Opera, Cardiff Welsh National Opera (WNO) and to a lesser degree, the Houston Grand Opera and New York Metropolitan Opera. At the other end of the spectrum are theatres like Geneva's Grand Théâtre and the Barcelona Liceu, which focus less on the classics and stage more contemporary operas. The Los Angeles Opera takes the same line regarding the classics, but not recent creations.

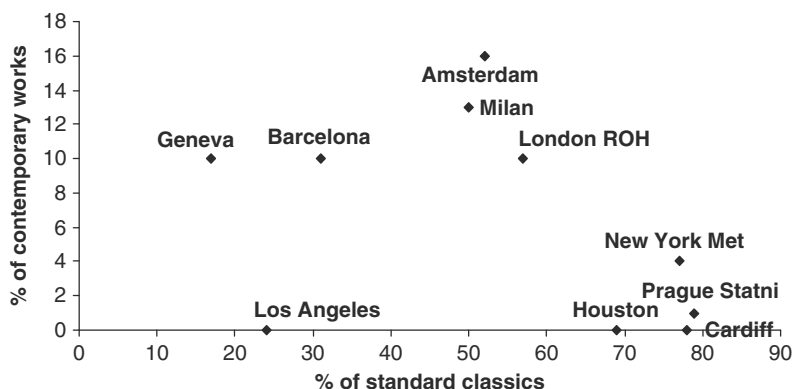


Figure 2.1 Examples of highly differentiated programming (2006–07)

These comparisons presented on Figure 2.1 are enlightened by views on multi-year programming policies.

Between these extremes, the Nederlandse Opera in Amsterdam, London's Royal Opera House and La Scala in Milan put on a high percentage of recent operas, but reduce the risks involved by presenting low-risk classics making up half of their season.

The WNO based in Cardiff practises “touring”. It organizes three blocks of programming respectively for autumn, spring and summer. Each block is made up of three to four productions initially performed in Cardiff, and then taken on tour to a number of other cities. For instance, “Autumn 2007” offered *Cenerentola*, *Il Trovatore* and *The Sacrifice*, a newly commissioned opera. “Spring 2008” presented *The Magic Flute*, *Eugene Onegin* and *Falstaff*. “Summer 2008” comprised *Aïda*, *Hansel and Gretel* and a new presentation *Alexander Nevski/Carbon 12*.

Not every city staged the same number of touring performances. In 2007–08, Swansea was the venue for 6 operas totalling 9 performances, Llandudno 4 operas and 4 performances, Milton Keynes 3 operas and 5 performances, Bristol 6 operas and 10 performances, Birmingham 14 operas and 15 performances, Plymouth 3 operas and 5 performances, London 1 opera and 1 performance and Southampton 3 operas and 5 performances. There is thus a group of theatres staging 4–5 WNO performances (Llandudno, Milton Keynes, Plymouth, Southampton), and a group staging 9–15 performances (Swansea, Bristol and Birmingham), with a greater number of both operas and performances. In organizational terms, touring requires a four-month commitment by artists to each production, with 10–19 performances. Not all artists will accept this.

The practices of touring, and its inherent constraints, oblige the WNO to limit the risks in its choice of operas.

The Prague Statni Opera puts on close to 20 productions totalling over 200 performances per season, on the German opera house repertory model. Its programming concentrates on the most frequently presented works and included the following in the 2006–07 season: *Aïda*, *The Barber of Seville*, *Carmen*, *Die Fledermaus*, *Lucia di Lammermor*, *Madame Butterfly*, *Manon Lescaut*, *Nabucco*, *Rigoletto*, *Tosca*, *La Traviata*, *Turandot* and *The Magic Flute*.

Den Nederlandse Opera (DNO) in Amsterdam shows great continuity in the number of productions performed each season. The average number of operas is ten, five of which are new, and the average number of performances is 100. There is a balance between very popular titles, operas that are less well known or rarely performed because of their cost, and newly composed operas. A recent DNO report comments that: “Baroque operas, the ‘iron repertoire’ and new works of contemporary composers have been equally represented during the past seasons.”

In 2002–03, for instance, 11 operas were staged. Two were very popular: *Butterfly* and *Flute*; four were classics but less frequently played: *Titus*, *Fidelio*, *Macbeth* and *Euryanthe*. *The Makropoulos affair* and Shostakovich’s *The Nose* can be considered as quasi-classics. The other works performed at the DNO that season, *Tea* by Tan Dun, *Die Soldaten* by Zimmerman and *Le Balcon* by Eötvös were more recent compositions or creations.

In 2005–06, programming included a full *Ring*, and made considerable space for new compositions or very rarely presented operas by Henze and Van der Aa. This programming strikes a good balance between continuity and audience appeal, with an obvious international flavour. Pierre Audi follows a continuity policy, regularly inviting some of the best-known conductors as Edo de Waart, Harmut Haenchen or Christophe Rousset, and Robert Wilson, Willy Decker, Peter Stein, Peter Mussbach among other stage directors.

Three key words describe the programming policy at the Grand Théâtre, Geneva: constancy, autonomy and balance.

Constancy: for 25 years, each season has consisted of eight operas and two ballets. Autonomy: every season’s programme comprises an average of four to five new productions developed entirely by the Grand Théâtre, one revival, and one co-production or rented production.

Balance is no doubt the most important key word.

First of all, there is the balance between periods and schools. This meets the expectations of an informed audience and the public service mission conferred on the Grand Théâtre by the city of Geneva. In the

past, baroque operas were under-represented, partly because there were no ensembles suited to performing operas from that period. With the recent formation of the Geneva Chamber Orchestra, this is no longer the case today. The present is represented by one contemporary work each year. "The crisis in opera composition is now beginning to resolve. Contemporary composers seem more motivated and comfortable with their function than 20 or 30 years ago", says Jean Marie Blanchard.⁶

Another necessary balance is between the contributions required of ensembles of artists, particularly the chorus. They must be sufficiently motivated by the choice of operas, an important factor being the number of performances during the season.

There is also the balance related to optimum use of production resources, in this case the contributions expected of the workshops (sets, costumes, props).

And finally, there is financial balance. Productions fall into four groups: very expensive, moderately expensive, inexpensive or very inexpensive. Empirically, efforts are made every season to balance production types and costs, so that the expense falls within an agreed budget.

This policy was reflected in the 2006–07 season programming, which included *La Incoronazione di Poppea* and *Ricardo Primo* alongside *J'étais dans ma maison et j'attendais que la pluie vienne* by Jacques Lenot. The sole representative of the classics was *Così fan tutte*, accounting for only 17 per cent of performances.

La Scala in Milan also follows these balance rules. In its 2006–07 season, the classics made up 50 per cent of performances, in line with the general average; the baroque period was represented by *Ascanio in Alba* and the contemporary period by *Il dissoluto assollto* (Azio Corghi) and *Candide* (Bernstein). Italian operas occupied half of the programme here, as elsewhere in the world. Rarely performed or little-known works such as *Cyrano de Bergerac* receive support intended to reduce the risks. La Scala stands out in its search for audience appeal.

Stéphane Lissner aims to bring together world-famous artists (conductors, singers, directors) to link today's La Scala to the heights of its historical tradition. In the early part of the 20th century, Toscanini, Kleiber and many others left a strong mark on La Scala. After the Second World War, stage directors who have since become legendary like Visconti, Zeffirelli and Ronconi oversaw productions remembered today in photographic and sound archives, and sometimes on film and video. Maria Callas and the greatest Italian singers of the second half of the 20th century, and all the greatest Italian and foreign conductors from

Victor de Sabata to Guilini, Furtwängler to Karajan, have performed at La Scala. On 7 December 2007, for the opening of the 2007–08 season, Daniel Barenboim, Patrice Chéreau and Waltraut Meier respectively conducted, directed and sang a *Tristan und Isolde* broadcast simultaneously in several European countries by the TV channel Arte. Future plans are just as ambitious: a *Ring* with Barenboim and a Monteverdi year.

Excellence is the watchword at the Houston Grand Opera. Programming is designed to offer a balanced choice of operas, and the 2008–09 season is a good example of the mix. Six operas were performed five times each in the Brown Theater. Of the six, only two are taken from the popular standards: *Rigoletto* and *Cavalleria Rusticana/Pagliacci*, “CavPag” as often nicknamed in the USA. Then comes a fairly little-known Berlioz opera *Beatrice and Benedict*, starring Joyce di Donato, followed by a 20th-century opera, Britten’s *Midsummer Night’s Dream*, and the world premiere of a new opera composed by André Prévin, *Brief Encounter*, based on the very famous David Lean film of the 1940s. A production called *Chorus* conceived by David Poutney provides several opportunities to offer the audience some of the best-known choruses from *Nabucco*, *Il Trovatore*, *Carmen* and others. This puts the spotlight on the chorus and its individual members, showcasing their artistic skills, just as in some opera houses the orchestra is occasionally or regularly invited to perform in concert on the stage. This is an effective way of generating value from the existing artistic resources. The mix of productions in this season illustrates that the Houston audience is being offered excellent contemporary European composers alongside the well-known operas and composers.

In the last three seasons, the operas selected have fallen into three groups: the “building fund” consisting of ten popular operas allocated a budget of \$10 million, the “discovery fund” comprising 14 operas or other shows including world premieres, with a budget of \$26 million, and a series of six “Brittens” with \$11 million.

In Anthony Freud’s view, the opera must meet the needs of society by offering innovative projects. In the discovery fund section, the creation of Christopher Theofanidis’s *The Refuge* is an innovative attempt to celebrate extraordinary stories of African-Americans in Houston. It takes the format of a contemporary opera presenting significant interactions between several Houston communities. This project received contributed financial support.

At the Royal Opera House in London, the programming must offer a mix of works to satisfy the tastes of Covent Garden audiences – operas by the great Italian or German composers, but without neglecting English or American operas and other European works, recent or otherwise.

As in the other major European and North American opera houses, the public would be disappointed if there was no opportunity to see major masterpieces by Mozart, Verdi, Puccini or Wagner, though less well-known operas are also performed. Contemporary works such as *The Tempest* by Thomas Adès and *Sophie's Choice* by Nicholas Maw are commissioned. The programming at Covent Garden is not very far from the average for all major opera houses, as shown by its position in Figure 2.1.

The New York Metropolitan Opera also gives pride of place to the operas most likely to please a broad audience and fill its immense 4,000-seat theatre. Of the 208 performances during the 2006–07 season, 160 were of classics – enough to make the observer wonder whether the Metropolitan Opera is following or setting the standards for opera! In any case, it is being faithful to its own tradition, since 42 per cent of performances concerned the works in its own “top ten”. Mozart, ranked fairly low in that table, made a strong comeback with almost 15 per cent of performances.

Only one contemporary work was programmed: *The First Emperor* by Tan Dun, a co-production with Los Angeles Opera. All the conditions were fulfilled to ensure that this opera would attract a good audience. Over the years Tan Dun has drawn new audiences to classical music with eclectic works that find common ground between Asian traditions and the avant-garde. His ferociously propulsive film score for “Crouching Tiger, Hidden Dragon” won him both an Oscar and a pop-culture following. Zhang Yimou, the Chinese director of this production, best known for his popular film “House of Flying Daggers” also adds lustre to the project. And Placido Domingo, by taking on the title role, the first role he has created in his 38 years at the Metropolitan Opera, contributes his formidable star power. Creating an event is becoming one of the ingredients of opera marketing.

The Los Angeles Opera stages relatively few “standards” but remains faithful to the great creative periods of operatic history: the 19th century and the first half of the 20th century. Five of the productions in its 2006–07 season were joint operations (co-productions or rentals) with other opera houses, namely the Berlin Staatsoper, Netherlands Opera, San Francisco Opera, Washington Opera and Madrid's Teatro Real.

A complex, integrated decision-making process requiring a well-developed forward planning capacity

Programming an opera means bringing the following elements together at a given time and place to prepare an opera the theatre wishes to

present to the public: a conductor, singers, a director, a set designer, a costume designer and a lighting designer. Each title requires its own artistic and technical resources which may differ considerably. The opera managers have to build their season programming ensuring that, altogether, they can cope with available in-house or outsourced artistic and technical resources – a theatre, a chorus, an orchestra, technical, commercial and administrative staff, and last but not least with budget allocations. An opera house with serious artistic ambitions must attract the best – not necessarily the most rarely seen and most sought-after, although the prestige of the greatest names leaves no one indifferent, but the best-suited for a successful production. Good knowledge of operatic circles, a good network of contacts and sound relationships are just as necessary for success as the ability to take calculated risks. Also required are plenty of time and the ability to make the long-term commitment involved in engaging a team of artists 3 or 4 years in advance. We thus see three of the critical success factors for programming: professional competence, good contacts and a long-term appointment as manager of the opera house. These factors are considered normal today in the shared understanding of an opera house manager's skills.

There is no typical sequence in the process. The opera itself is not necessarily chosen before the artists. The decision by the Metropolitan and its co-producers to stage *Cyrano de Bergerac* may originally have been put forward by Plácido Domingo, as an *Associated Press* release suggested.⁷ The choice of artists can sometimes be dictated by the resources available. It is the addition formed by the operas, singers and resources mobilized, some acquired from other opera houses, which defines an opera house's artistic policy. When decisions are integrated to this extent, what is needed is a collective approach encompassing certain trade-offs.

This is a long process, requiring excellent forecasting of the theatre's future operating environment and involving commitments to a range of partners: particularly singers, associate theatres and financial backers. Multi-year planning is needed for clarity.

A complex decision-making process

Defining a programme spanning several years or seasons is one of the essential duties of opera house management and good practices may be identified. The task generally falls to the general manager. At Geneva's Grand Théâtre, at least since its reopening in 1962, programming is the sole responsibility of the director general. At the Cardiff WNO, it is

prepared by John Fischer, chief executive and artistic director. At some opera houses, programming is delegated to the artistic director, as in Madrid, or the musical director as in Turin, but the general management has the final say in the compromises between artistic ambition and budget balance. In Chicago, William Mason is responsible for reconciling the artistic and economic dimensions of programming, an art for which the Lyric Opera is renowned.

But the fact that ultimate responsibility lies with top management should not be allowed to mask the complexity of a decision-making process that involves many different people. Covent Garden is a good illustration of this. Three persons are concerned at the proposals stage: Elaine Padmore, opera director, Antonio Pappano, musical director and principal conductor, and cast manager, Peter Katona. Responsibility is shared. Elaine Padmore asks Antonio Pappano what his views and wishes are. She has her own proposals, and discussion ensues. As in most opera houses, the final choice of titles depends on various circumstances and opportunities: the availability or proposal of a particular singer, conductor or director, co-production opportunities, season balance and so on. Programming will take several issues into consideration: a balanced selection of operas for the audience, the presence of a sufficient number of world-renowned voices and conductors that the public expects to find at Covent Garden and, last but not least, a cost balance between productions. The three of them present their proposed programming to Tony Hall, the chief executive of the house. At Tony Hall's level, the whole of the programming – opera, ballet, orchestra and other productions – is put together. Once the basic plan is accepted, a whole financial and budgetary process begins to put figures on the programming, both in terms of costs and expected box office income before final decisions occur. Programming is a management process here, with both intuitive and rational experience-based input. Ultimately, both artistic and financial dimensions matter.

The same collaborative decision-making process can be observed in Amsterdam. The DNO has been managed for 10 years now by a team consisting of an artistic director, Pierre Audi, and an executive director, Truze Lodder. Pierre Audi is responsible for programming and artistic direction and Truze Lodder for management of both the DNO and the Het Musiektheater. All contracts are signed by Truze Lodder. She notes that she and Pierre Audi are in mutually challenging positions. Pierre Audi pushes to obtain what he considers the necessary resources for the productions he will head. Truze Lodder does her best to meet his expectations, within the limit of the budget that can reasonably be made

available. “Hot decisions, joint responsibilities”. This works because the two executives trust each other, and because the rules of the game are clear as far as the equilibrium between available financial resources and expenses is concerned.

Former general director of the Grand Théâtre of Geneva, Jean Marie Blanchard says “I never felt having too much artistic budget, neither to be short of money. . . . our management is very demanding vis à vis all of us who are also responsible for the financial balance of the Grand Théâtre”.⁸ “Artistic excellence is a primary preoccupation”, says William Mason,⁹ general manager of the Chicago Lyric Opera, “but we must not forget that we also run a business”. In the end, programming decisions are made by William Mason, in close collaboration with musical director Sir Andrew Davis with input from the head of communications and marketing, Susan Mathieson, and financial director, Richard Dowsek.

The recipes for success are always the same. Does opera programming always consider simultaneously artistic and financial decisions? The answer is yes when objective financial constraints and their own personalities lead opera managers towards such attitudes. This is part of a more global interaction between artistic and financial management which can precisely be considered as a good management practice of opera activities.

Programming and the choice of guest artists

Since permanent “troupes” of singers able to handle title or secondary roles have disappeared all over the world, except in the German opera world where they are known under the French name of “ensembles”, most opera houses have to rely on freelance artists – not only singers, but also conductors, stage directors and other technical or artistic specialists. Though we have no figures, it can be said for sure that the major part of them are locally hired. A few of them enjoy a world reputation, and travel all over the planet to ply their trade as freelancers. Against this background, programming is the task of building a coherent, harmonious, attractive collection of operas and resources, within time and cost constraints. The most sought-after artists are booked up for years in advance, and command very high fees. Engaging several such artists for a single opera is rather like launching a rocket. The launch window has to be defined, often several years in advance. It is a costly and risky enterprise, which only the most prestigious houses manage. Others count on promising young artists to renew casts and limit costs. Every house has its own formula.

The great voices can regularly be heard in most of the large and prestigious opera houses. It is part of their audience's expectations. Artists enjoying worldwide reputation are themselves part of the decision process to go or not go in such or such opera house, and not only depending on the fees. The few singers looked for by the largest opera houses have heavy multi-year agendas. They also build their presence policy in the different opera houses. They would generally prefer the large ones. Feelings nevertheless play their role. Bryn Terfel was born in Wales. He is faithful to the WNO where during the 2010–11 season he will be *Meistersinger's* Hans Sachs.

In Lyon, where box office constraints are softer because of the small auditorium size and its extensive public funding, stage directors are chosen to suit the content of the opera and the music itself. "There's a lot of amateurism in opera, 'stunts' are organized, Krystian Lupa and the *Magical Flute* is very fashionable! We need to seek a good match between the opera and the stage director. We'll choose Marthaler for works that are more theatrical than musical. Not all conductors are comfortable with all works," declares Serge Dorny. "What is sought is the right balance between singing and acting, music and drama or comedy."¹⁰

Medium-term planning

Advance planning is necessary to make sure the guest artists are available, commission stage directors and set designers, and reduce production costs, develop sponsorship and schedule work for the workshops involved. Planning a long time ahead is risky. Voices change, and so do the singers' repertoires. The minority of "major" opera houses build their programming around the availability of a singer or a small group of singers. Most houses plan their seasons on multi-year horizon times. In German opera houses, in-house resources limit but do not suppress the necessity to call for freelance artists. Except for certain heroic voices – Wagnerian tenors and sopranos – markets are wide, and good voices may be found without too much difficulty.

Season programmes are most often prepared over a three to four-year horizon, with an increasing degree of precision for years one and two. Work begins with a provisional choice of titles, examination of opportunities and identification of artistic and technical partners. Three years in advance, the main features of the programme are defined: the operas, the external producers and the principal singers have been chosen. Two years in advance, the programme is finalized and a preliminary model of the productions must be presented for assessment of feasibility and cost

levels. Then the contracts are signed. The final model fixing the plans for the production phase must be supplied 1 year in advance.

This practically standard procedure appears to be the norm everywhere, subject to slight adjustments. Covent Garden states that it plans over 5 years. At the Lyric Opera in Chicago, the operas are chosen 3 to 5 years before they are actually performed, and the same timescale applies to the Paris National Opera's multi-year plan. "In Houston anticipation is a key condition both to ensure quality and excellence, and to keep costs under control" declares Anthony Freud. Opera houses that plan over a short horizon are beginning to move closer to this norm. At La Scala in Milan, this is a real innovation. Before Stéphane Lissner's arrival, programming was set 2 years or less in advance, which always involved the risk of higher costs and unforeseeable events. Today, programming is prepared over horizons of 3 to 5 years, and in a new, positive development, the Italian minister of culture now asks the 12 foundations that manage Italian opera houses to prepare three-year budget plans. At Warsaw's Teatr Wielki, where programming used to take a short-term approach, alignment with the international standard practice of medium-term planning is one of the key management issues today.

This shift carries the seeds for change in management methods at opera houses, particularly relations between the houses and their governing authorities or principal sponsors. The one-year timescale used for public budgets, which generally require annual approval, is incompatible with commitments over longer periods. Innovative practices are increasingly bringing public and private management methods closer together, and representatives of public institutions and the principal sponsors are more often involved in opera house governance bodies. The private bodies, which construct their image on the representations conveyed by opera houses, want constancy and continuity. Stability in the management team is a guarantee of this.

Because of its many facets and the long-term planning required, programming is the decisive factor in an opera house's strategy. Its strategic nature is reinforced by the growing interdependence visible between opera houses and their financial backers.

2. Developing and operating a repertory

For German opera houses working on a repertory system, programming an opera consists either of bringing a production back to the stage after a period of absence, or adding a new opera to the repertory with the

intention of performing the same production in future seasons. At opera houses still working on a traditional *stagione* system, each production is new and intended to be performed in that season only. Currently, the two systems tend to cohabit in medium to large opera houses.

Objectives of a repertory

Creating, managing or renewing a repertory fulfils different objectives, and much depends today on the musical dimension of the opera or its theatrical aspect, or both, or on the *raisons d'être* of repertory opera houses as viewed by their managers. From the musical point of view, there is no doubt that in the cities where repertory opera houses exist, audiences are willing to listen to the operas they are attached to. In Vienna as in Munich, local opera goes live with operas from Mozart, Wagner, Richard Strauss and also from Italian composers. Old productions may be kept for years, when they are robust enough, as a famous *Tosca* which was performed 500 times in Vienna. At the New York Metropolitan Opera, Joseph Volpe asked Franco Zeffirelli to stage a *Bohème* in 1981. The production had a cost of \$823,900 (\$2.5 million today writes Volpe in 2006), was performed 327 times between 1981 and 2006 and was responsible for \$140,000,000 box office income during this same period (Volpe, 2006, p. 99). People went to see a warhorse, and also a reputed production on its own. In all respects, it appears to have been a coherent decision. In Germany and Austria, today's audiences as attached they may be to the musical dimension of opera also want new theatrical achievements, and the large number of "Intendant-Regisseur" leading the German Opernhaus are only part of the explanation. The sociology behind the repertory system is not as simple as it looks at first. Though it is not surprising that the repertoire and high volume pattern of opera activities is to be observed where opera is most strongly rooted in history and tradition and this is true also in New York at the Metropolitan Opera.

The Vienna Staatsoper has a repertory of 97 productions, the oldest dating from 1955. When an opera is first added to the repertory, the number of performances is generally high – between 5 and 15 depending on its potential audience – but in subsequent seasons the production will be performed five times or less. The most frequently performed operas in Vienna since their respective premieres are, in descending order of number of performances: *The Magic Flute*, *Tosca*, *La Bohème*, *The Marriage of Figaro*, *La Traviata*, *Der Rosenkavalier*, *Simon Boccanegra*, *Romeo and Juliet* and *Nabucco*. This list covers the operas most frequently performed by all opera houses, bearing in mind that some Vienna

productions are not included because they are too recent. Examples are *The Ring* production of 2007–08, but also *Boris Gudunov* (2007), *Faust* (2008), *Idomeneo* (2006) and *Manon* (2007).

Some of the works in Vienna's repertory are less popular and are seldom or never performed, such as *Ernani*, *Penelope*, *Prince Igor*, *Gesualdo* and a number of others.

Economically speaking, the production costs – staging, sets, costumes, props – for the most performed operas are lower per performance, as they are spread over a large number of performances. This results in a better balance between box office income and direct production and distribution costs. These operas reduce the risks for the whole repertory, as the income they generate not only covers their direct costs but makes it possible to finance productions that are riskier or have a shorter performance life.

Over the period 1992–2003, 69 operas were staged at Bastille Opera which is part of the Paris National Opera with the Palais Garnier, from *Medea*, *Pénélope* and *Espace dernier* which each ran for six performances in one season only, to *Carmen*, performed 98 times and *Tosca*, *La Bohème* and *The Marriage of Figaro* which totalled over 60 performances across several seasons, to *War and Peace*, for which the production costs are so high that any hope of achieving equivalent box office income would be an illusion.

For each opera title, the number of performances depends for a part on its expected audience success. If titles choices meet the audience expectation, then income is proportional to the number of performances. Direct production costs include a fixed portion consisting of the costs incurred for production of an opera before tickets are sold for the premiere, plus the costs associated with each subsequent performance. Figure 2.2 for Bastille Opera shows that the break-even point between costs and income comes when the production reaches 17 performances (Agid and Tarondeau, 2006, p. 171). After that, every additional performance generates a surplus. This shows that in repertory management, the most frequently performed operas finance the least performed operas, which can only reach break-even point between direct costs and income if they are performed in at least two or three seasons.

Managing a portfolio of products

From this perspective, programming consists of managing a portfolio of “products” and the decision to produce new operas is considered in parallel to the question of whether existing productions should be discontinued or revived.

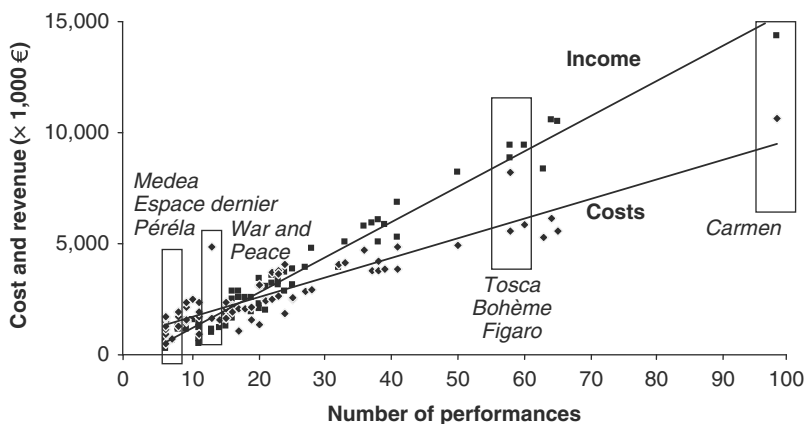


Figure 2.2 Income and costs at Opéra Bastille

The economic value of a production in the repertory is assessed as the value of a stock of resources that can be used to present operas that may be profitable in subsequent periods. In economic terms, the repertory is an asset and its value can be measured as the discounted value of net cash flows expected over the useful life of the production in the repertory. Of course, the value of a repertory is the sum of the values of the productions it contains.¹¹

Sometimes, newly appointed managers, driven by the desire to have their name associated with new works or new productions, neglect operas placed in the repertory by their predecessors, preferring to create new productions that will raise the profile of their theatre and their own reputation. While this may be of benefit in terms of artistic creation, the value of the works in the repertory collapses and production costs rise.

Even for operas operating a *stagione* system, the operas available in the repertory are valuable vectors for flexibility and budget adjustment. Miguel Muñiz, the general manager of Madrid's Teatro Real, has declared his confidence in the theatre's ability to weather the crisis.¹² "For 2009, public grants have been frozen. In the short term, the probable reduction in public funding will not be offset but the opera has considerable flexibility through use of old productions, co-productions and rentals, or operas with smaller casts, and various savings."

When productions are intended for one run only – In some festivals and "pure" *stagione* system operas – the adjustments will be made through the network of co-producers which share the direct fixed costs

inherent to any production prior to actual performance. Unsurprisingly, “some festivals” distribute their productions through co-production or rental arrangements, and the biggest co-producers are the *stagione* opera houses.

In the 2008–09 season, the operas co-produced by the Teatro Real were *Un ballo in maschera* with Covent Garden, *Il trionfo del Tempo* with the Zurich Opernhaus, *The Rake’s Progress* with La Monnaie in Brussels, Opéra de Lyon, San Francisco Opera and Covent Garden, *Tannhäuser* with the Los Angeles opera, *Il ritorno d’Ulisse* with La Fenice in Venice, *Rigoletto* with Barcelona’s Liceu and the Amsterdam Opera, and *The Marriage of Figaro* with ABAO Bilbao and Teatro de Las Palmas. Since Antonio Moral took over as artistic director in 2005, all new productions except one have been co-produced.

Programming must strike the right balance for each house, according to the context in which it operates the cult of the new and protection of the heritage.

It concerns the financial policy as well as the artistic policy. In all cases (although to a lesser degree for *stagione* opera houses), creating a repertory not only meets a short-term objective of balancing costs and income over a single season, it also meets a long-term objective: that investment in a production should be recovered over its “performing life”.

3

Artistic and Technical Production

Opera production and performance and the art of assembling a huge number of totally different artistic and technical resources are the core activities of opera houses all over the world. Both the production techniques used in the earliest European opera houses of the 16th and 17th centuries and today's production modes reveal this capacity for "assemblage" to be an opera producer's decisive skill. The dimensions and artistic standards may have changed considerably, and modern technologies may have given opera houses resources that would have been unimaginable even just a century ago, but the present and past situations overlay each other.

Let us begin with a small glossary. In the language of opera, what is a production? It is a title or work, a musical score and a libretto, a staging with sets, costumes and props, generally designed for a specific theatre. When the production comes to a performance, it is also a visible number of soloist singers, sometimes a choir, always an orchestra whatever its size. Some of its content is invisible: the organized work of stagehands, electricians and of a number of specialized technicians. It is an "assemblage". But it is also a process of learning the application of all these elements through rehearsals, so they will combine to form an opera on stage. A newly created production may display varying degrees of innovation. A world premiere is the creation of a production never before been performed in public: for example, *The First Emperor* (Tan Dun and Ha Jin) at the New York Metropolitan Opera in December 2006, or *Marius et Fanny* (Vladimir Cosma) at the Marseille Opera in 2008–09. A local premiere presents a production never performed before in the region or theatre concerned, for instance, Benjamin Britten's *Death in Venice* in Bregenz and Lyon. A new production is an opera already performed in public, but now presented with a different combination of

resources (“assemblage”) and new learning. A production is performed on stage during a given season, but may also return for further performances called revivals in one or later seasons. This was the case for *The First Emperor* at the New York Metropolitan Opera in May 2008. During a season, there are several performances of each production, involving casts and mobilizing technical and front-of-house staff. Performances take place in theatres that are part of the “house” or at other venues when a production goes on tour. The production process for an opera is completely different for a new production and for a revival. For a new production, the process consists of all the operations necessary to bring an opera to the stage, starting from scratch. For a revival, the process is shorter and involves using available sets, costumes and props to put on a production that is still alive in the memories of the chorus, orchestra, and artistic and technical personnel, as far as they were present at the time of previous performances.

The macroeconomic structure of opera houses varies widely between different parts of the world. German houses put on a large number of performances in small-capacity theatres, while North American opera houses stage few performances, but in large auditoriums. In microeconomic terms of artistic and technical production, the first openly displayed and visible criterion of differentiation between opera houses is the volume of productions and performances, although this must be considered in view of their level of specialization. The production modes inherited from the past – repertory, stagione, festival – are partly defined in terms of volume: a large number of productions, each performed a small number of times at repertory houses; a smaller number of productions but with more performances per production for stagione houses and festivals. Volumes and modes of production have a considerable influence on the learning and memorization processes for opera houses’ artistic and technical staff.

Opera productions are assemblages of resources from many diverse sources: each of those resources must be present and fully operational on the day and time of the premiere, which is set a long time in advance. What are those resources? Who holds the powers of assemblage? The opera house general managers and their staff? Their external partners? These questions encompass two dimensions: the artistic and the financial. In their management of complexity, opera houses are differentiated by the varying proportions of in-house and outsourced resources involved in opera productions. They are also tending to share a growing number of productions in order to enhance their programmes and reduce production costs and also sometimes to attract the best artists.

All artistic and technical decisions carry a financial dimension expressed in unit costs and cost structures, and these can be used for comparisons that are still imperfect but essential.

1. Opera production volume and degree of opera house specialization

The volume of an opera house's opera activities is generally measured by the number of performances and the number of different operas or productions during a season. The largest opera houses stage up to more than 200 opera performances a year in their main auditorium. There is a performance almost every evening, plus the occasional matinee. Considering all their activities, the most active opera houses attract between 500,000 and nearly a million spectators each season. The New York Metropolitan Opera is the largest opera house in the world. The highest figures are to be found in the great European cities. The smallest houses and companies only present a few performances of one or two operas every year, with audiences totalling a few thousand. In Europe and North America, regardless of institutional management style and geographical differentiation, opera performances are distributed between a small number of large houses and a large number of small houses.

Defining opera houses by their volume of activities: decisive but insufficient

In environments as different as North America and Europe, opera houses and companies differ, sometimes considerably, in size. Although our statistical analysis sample can only properly represent the largest houses, that is, those attracting a combined total of 75 per cent of all opera audiences, ranking them by number of performances produces convincing results presented in Table 3.1.

Only one American opera house puts on more than 130 opera performances per season: the New York Metropolitan Opera (240 performances in the 2005–06 season). From the Frankfurt Opera, which stages 250 performances, to the Bremen Opera with its 131 performances, 15 German opera houses belong to the group of the largest opera houses as measured by volume of opera activity. In the 2005–06 season, only five American houses raise their curtain more than 60 times per season: the New York Metropolitan Opera, the New York City Opera, the Lyric Opera of Chicago, the San Francisco and Los Angeles Operas. In Germany, from Aachen to Wiesbaden, 30 houses present between 60 and 130 performances each season.

Table 3.1 Opera houses ranked by production volume

Opera performance group	Average number of opera performances	Average number of productions	Average number of revival performances	Average number of ballet performances	Average number of concerts	Average number of touring venues
> 130	188	26	127	49	20	3
60–130	85	13	46	21	14	4
< 60	37	7	19	4	8	6

Note: Opera houses are classified in three groups according to the number of opera performances in the 2006–07 season.

Source: Comparative table of opera houses, *Opera Europa*, Prague, 2007.

These three groups show significant similarities and differences. The houses with the most performances are also the houses presenting the largest number of works per season, or the most productions. The average number of performances of each work does not vary greatly with production volume, standing at an average of five in the smaller houses and seven in the larger houses. The large houses tend to present productions inherited from previous seasons more than their smaller counterparts. Two thirds of performances in the large houses are revivals, compared to half of them in the other houses.

Measures of productions and performances alone are insufficient for satisfactory comparison of opera houses. There are many explanations for this, starting with auditorium size and the operating philosophy generated by the missions assigned to opera houses.

Compared on Table 3.2, the Welsh National Opera (WNO) in Cardiff and the Lyric Opera of Chicago would be considered similar in size judging solely by the number of opera performances per season (74 and

Table 3.2 A sample of the extreme diversity of opera house activities

	Number of opera performances	New production performances	Revival performances	Number of opera productions	Number of ballet performances	Number of concerts	Number of venues
Cardiff	74	3	71	6	0	6	10
Chicago	83	72	11	8	0	0	1
Dresden	200	15	185	43	69	34	1
London ¹	168	53	115	26	139	108	1

Note: Operas, ballets and concerts performed on the main stage, except in the case of Cardiff (WNO, see above).

Source: Comparative table of opera houses, *Opera Europa* Prague, 2007.

83, respectively, in 2006–07). But the WNO mostly performs existing productions, whereas the Lyric Opera renews a large proportion of its programmes every season. The Lyric uses a single theatre, while the WNO performs in ten different theatres! The average cost per performance is approximately €210,000 for the WNO and \$661,000 for the Lyric. In the same season, the WNO achieved an average 72 per cent seat occupancy rate, compared to 98 per cent at the Lyric. Another major difference is the theatre capacity: the Lyric has 3,563 seats available every evening while the WNO performs in theatres with an average capacity of 1,610 (1,690 at Cardiff). A logical difference in ticket sales ensues: 286,346 tickets sold by the Lyric and 140,000 by the WNO. The Semperoper in Dresden and Covent Garden in London are two of the largest houses in terms of number of opera performances, but there are still many differences between them. The Semperoper staged 43 works, with an average four performances each, while the Royal Opera House (ROH) staged 26 works with an average 6.5 performances each. Neither the theatre capacity (1,309 seats in Dresden and 2,267 seats in Covent Garden) nor the audience sizes are comparable. As we shall see later, these differences lead to very different financial structures.

A second differentiation factor also plays an important role: the degree of specialization by opera houses and opera companies.

Degree of artistic diversification by opera houses

Examination of opera houses' non-opera activities shows that in Europe, but not in the US, the most active houses are also the most diversified. However, comparisons are difficult due to the range of relations between opera houses and the theatres where opera production and performances take place, and the varying statuses of non-opera activities.

Scope of artistic activities: diversification data and criteria

An opera house's operatic function encompasses activities and performances for children and training for young singers. The first is frequently found, the second to more variable degrees.

The promoters of activities intended for children see them as having two equally important functions: participating in the personal development of children and teenagers by encouraging their interest and motivation for any of the artistic careers involved in opera, and contributing to renewal of opera house audiences. From the mini-operas specially composed and performed in local schools by the American

houses to the more sophisticated works for children that tend to be performed in the theatre foyers or smaller auditoriums, artistic and educational activities for young people take a range of forms described in the next chapter.

Many opera houses also play an active role in completing the training of singers, and sometimes dancers. These activities deserve close attention, because they contribute to the development of the opera houses' artistic resources, and the interest in their opera activities, as well as dance activities where relevant. Some opera houses run young singers' courses, in a range of forms and with varying resources as appropriate in the USA and Europe. Other houses, such as the Opéra National de Paris, are in charge of the dance schools attached to them. In Milan, La Scala Theatre Academy trains students in a wide range of artistic and technical theatre crafts, also preparing musicians and dancers for careers in opera and ballet. In opera houses in the German-speaking zone, ensembles of young soloists fulfil an advanced training function that is unique in the world. Training activities for artists often have clearly identified funding and their own dedicated budgets that are separate from the sometimes more general overall budgets of the opera houses (the ballet school at the Opéra National de Paris and La Scala Academy are two examples). The advanced training centres for young singers at American opera houses are highly active and receive earmarked donations.

Dance, symphony concerts and, especially in Germany and Austria, operettas and musicals are often performed on the main stages and are part of the diversification of opera house activities.

Dance activities

As the data in Table 3.1 show, opera houses with high volumes of opera activities (more than 130 performances) schedule more ballets and concerts than the other two categories. Opera houses hosting ballet companies have for most of them a long choreographic tradition, such as Covent Garden, the Bolshoi, the Opéra National de Paris, La Scala in Milan, the Mariinsky Theatre, the Vienna State Opera. These ballet companies are to a large extent independent in their internal organization and artistic policies but institutional links with the opera houses are strong and obey different institutional schemes. They are part of the planning process as they share the stage and scenic facilities with opera production and performances. These ballet companies are the main drivers behind the figures for dance productions at the houses with the highest volume of opera activities. With often large numbers of dancers,

they provide large numbers of performances on their main stages, and in national or international tours. In Europe, particularly France and Germany, opera houses at all levels of opera activity volume often stage ballets. From the angle of their specific costs, dance activities must be considered with caution due to heterogeneities in status and statistical data. The ballet companies are by no means always integrated into the opera houses. They often perform at operas on invitation, or under commercial contracts with the theatres, as at the Liceu in Barcelona and the New York Metropolitan Opera. At the Liceu, the programme includes “blocks” of dance productions. At the Metropolitan Opera, the theatre is leased to the New York City Ballet after the opera season has ended. The ballet dancers at Vienna’s Staatsoper and Volksoper and their counterparts at Berlin’s Staatsoper and Deutsche Oper have been unified in the mid 1990s and 2005, respectively, to form combined *Staatsballet* companies in the two capitals. They perform in their original theatres alternately.

Orchestral activities

Similar caution is needed when scrutinizing the statistical list of concerts organized by opera houses, both those with their own symphony orchestra – as is often the case in Germany – and the rest. On average, concerts represent 10 per cent of the programme at the large houses. They nearly always have a permanent orchestra dedicated primarily to operas, and managed internally. The statistical realities and the institutional situations do not always match up. While the German opera houses have traditionally been organized around their orchestras, many of them internationally renowned in their own right, such as the Wiener Philharmoniker, the Staatskapelle orchestras at Berlin and Dresden, or Leipzig’s Gewandhaus, those orchestras play in the pit for all opera performances in their opera houses, perform some concerts on stage and often go on foreign tours, when they perform as much if not more than in their home countries. In addition to these activities, operettas and musicals are sometimes staged at opera houses whose artistic missions cover such genres: examples are the Vienna Volksoper, the Gartnerplatz in Munich, the Komischeoper in Berlin and indeed many Musiktheater in Germany and Austria. In Europe, but not in the USA, the busiest opera houses are active in opera but also in ballet, concerts and sometimes operettas and musicals.

The diversification of opera houses’ artistic activities must also be assessed in the light of the diversity of their institutional situations.

Certain opera houses that own their theatre(s) and stage(s) dedicate all their activities to production and performance of opera (Lyric Opera of Chicago, Santa Fe Opera, San Francisco Opera). Theatres sometimes lease their facilities to external parties. The auditorium at the Palais Garnier can be rented. Covent Garden rents its main theatre and stage in July to private individuals, who generally put on shows on a turnkey basis. For instance, a Ring cycle from the Mariinsky Theatre was presented in July 2009 under the direction of Valery Gergiev. In another arrangement frequently encountered in Germany and the UK (WNO in Cardiff, Opera North in Leeds and so on), or the Netherlands Opera (Der Nederlandse Opera) in Amsterdam: the opera house or company rents or shares a theatre with other performing arts institutions, and management is thus shared.

The small houses and companies, which rarely have their own theatre, perform on tour at twice as many venues as the larger houses: they find it is to their advantage to increase their audience, for commercial or purely cultural reasons.

2. Artistic and technical production modes

If we were writing in the early 1960s, the typology of artistic and technical production modes would have distinguished clear-cut differences between repertory and stagione opera houses, and festivals. A look back at the 1960s highlights the dominant features of these modes which still survive today, but not without some evolution.

Three modes in the early 1960s: repertory, stagione, festivals

Considerable differences have traditionally separated the opera houses using the production policies summed up by these three words.

Repertory houses used to present 20–40 works a year, sometimes more. This was the German model par excellence. There was a performance practically every evening of the year. The annual closure lasted around 5 weeks. A different opera was performed every day. Alternation of works made it possible to stage up to five or six different operas each week. Programming was often on a week-by-week basis. These opera houses had their own artistic and technical resources required to produce and perform the programmed operas. One of the most key features of repertory houses is that they each relied on a permanent ensemble of soloist singers. As an example, the Stuttgart Staatsoper in the 1960s hosted in its ensemble many of the singers who contributed to the Bayreuth reopening and success after the Second World War.

Wolfgang Windgassen was one of them. Wieland Wagner staged several productions at the Staatsoper then called the Winter Bayreuth. This organization also existed in many cities and capitals in Germany's neighbouring countries: Austria, Hungary, (North) Switzerland, today's Czech Republic, Poland, Russia and the Baltic countries, as well as others. Until the end of the 1960s, the Opéra National de Paris was still a repertory house.

The name of the stagione model indicates its Italian origins. The average number of works staged per season at a stagione opera house varied between six and eight. Each one is performed between four to ten times. The season lasts between 4 and 9 months, in contrast to the all-year-round operations of repertory houses. To avoid fatiguing the solo singers' voices, depending on the opera, just three or four performances might take place in a week. Alternation of operas was rare or non-existent, but there might be alternation between operas and ballets, concerts or even plays. Rationally, there was no vital need for permanent in-house artistic and technical resources. Employing a full-time symphony orchestra to play only in the orchestra pit was clearly not required, as the volume of use would have been far too low. There was no permanent troupe of singers; instead, singers were employed and paid for rehearsals and performances on a per-production basis. Often each opera had two casts, at least for the leading roles. Proponents of the stagione system stressed the clear concern for artistic quality, which could only be guaranteed by a sufficient number of rehearsals.

Opera festivals first appeared in the second half of the 19th century in Europe. All of them reflect their creator's wish to have opera productions renowned for their exceptional overall quality and often the distinctive quality of theatres built in settings outside the major capitals, with significant seat capacity differences. They were established in small- and medium-sized cities such as Aix en Provence (1950, several theatres), Bayreuth (created in 1876, 1,925 seats), Bregenz (6,800 seats), Garsington, Glyndebourne (created in 1933, 1,200 seats), Orange (created in 1869, 8500 seats), Salzburg (created in 1917, several theatres), Saint Louis, Santa Fe (created in 1957, 2,128 seats) and Verona (created in 1913, 15,000 seats) and others. Karajan in the 1960s at Salzburg and Liebermann in the 1970s at the Opéra National de Paris helped to make these legendary opera festivals popular.² There is no one-size-fits-all model for an opera festival. Festivals also take place in historic roman arenas (Orange, Verona). The number of works in the programme and the number of performances and spectators were and are still variable.

Recent shifts in the three modes

Changes appeared during the 1950–70 period which gradually transformed opera production. The arrival of the multi-track record captured legendary performances for posterity and brought opera to a broader audience. The rise in the “star system” was accentuated by the rapid advances in air travel and growing public interest in opera. These factors reinforced the globalization of planet opera, which has been in existence for three centuries. The real boom in American opera came after the Second World War. Just as settlers rallied around the construction of opera houses decades earlier, so groups of concerned citizens worked diligently towards the establishment of permanent opera companies. By 1960, nearly 40 of today’s opera companies had been established by passionate citizens, spanning the country from Wilmington, Delaware to Honolulu, Hawaii, from Texas (Houston Grand Opera, Dallas, Fort Worth) to Nevada (the Santa Fe Festival Opera) or Missouri (the Opera Theater of Saint Louis) were organized and still are based on the stagione model. In 1954, a great opera house, the Lyric Opera, was recreated in Chicago using the theatre built in 1931.

Operas increasingly began to be sung in their original languages. These changes did not all happen smoothly. When Verdi, Puccini and the Lorenzo da Ponte-Mozart operas had to be sung in Italian, Wagner and Richard Strauss in German, these shifts had a disastrous effect on many in-house troupes of singers. The best of them could become international, and would look for external freelance contracts. But their home opera houses would be obliged to hire soloist singers from other origins. They hastened the demise of the in-house troupe at several European opera houses, including the Opéra National de Paris, but not in the German-speaking zone. Up on stage, three-dimensional sets gradually replaced the painted backdrops that had dominated the first part of the 20th century. Stage directors played a growing role in artistic and technical production, assisted by set, lighting and costume designers, and then video artists, all external to the opera houses requiring their services. The second half of the 20th century was the age of stage directors. These developments strengthened the stagione and festival modes practically all over the world. They did not eliminate the repertory model in the German-speaking zone, but influenced some changes. Some repertory house general managers considered that public demand for renewal of productions was higher than before. The appeal of the “star system” made it more difficult to keep the most renowned singers permanently in the best repertory house ensembles, and repertory house

audiences too wanted to hear the world's most famous singers. Tough controversies then appeared between the defenders of the repertory and stagione systems. In Europe, some supporters of the stagione model emphasized the excellence of this system because it was based on a much greater number of rehearsals than in the repertory organization where often revivals were not even preceded by any rehearsal. To them, the repertory mode of organization would not take enough care of quality issues. The repertory leaders would argue that thanks to a much bigger number of productions and performances in their theatres, orchestras, singers and choristers would have a much better knowledge of a much larger number of works than their stagione counterparts, and that altogether their labour involvement would be much higher. The need for a large number of rehearsals would be proportional to the stage director's costly perfectionism and to the necessity for artists to learn the opera works.

Progressively, viewpoints and practices in the two systems better understood each other even if the two models still differ significantly. In the early 1990s, the belief emerged in some repertory houses that a lack or shortage of orchestral and vocal rehearsals before revivals was affecting the musical and visual quality of productions. These developments brought certain stagione-type features into repertory houses: grouping performances of a given production into the same period, with partly constant casts; a higher number of new productions and sometimes a shorter performing life for existing productions. These changes are still ongoing.

Three production modes that remain differentiated

The figures in our database for the period 2006–07 lead to statistical conclusions confirming that the three traditional modes of production are still alive and well.

Repertory operas have high production volumes, whether the volume is measured by the number of performances or the number of operas performed. Statistically, revivals now account for more than two thirds of performances. The people we interviewed for our study remembered these volumes as being higher in the 1960s. We should really speak of a German repertory model today. Widespread in Europe before the Second World War, this model has gradually disappeared across the world. In the German-speaking countries, repertory houses are not only to be found in the major cities. In Essen, Erfurt and many other cities of medium importance in Germany but also in the Baltic countries, for example,

Riga and Vilnius, production policies continue as before to follow the repertory production mode.

Stagione opera houses are observed as well in large cities with populations of several million as in smaller cities. Their average number of opera performances is one third of the repertory house volume. Repertory houses benefit from volume and learning effects, as we shall see, which make their production modes the most effective in terms of cost per performance as Table 3.3 indicates. Statistically, they rank lower on the cost per ticket sold due to the relatively low capacity of their auditoriums.

Festivals, insufficiently present in our database, stage a small number of performances and operas, with or without revivals of previous seasons' productions. The large-capacity auditoriums probably explain the cost per ticket sold, despite the fact that based on cost per performance the festival production mode is the most expensive.

The festivals' catchment zone extends well beyond the urban communities where they are located. Bayreuth, Salzburg, Glyndebourne, Aix en Provence or Santa Fe have to different extents an international audience. Other festivals such as Verona, Orange and Bregenz benefit from locations with strong tourist appeal, or focus on outstanding quality without neglecting highly professional communication campaigns. Yet others, for example, Garsington, benefit from a niche effect.

At stagione opera houses, production volumes are similar to festivals, but the percentage of old productions is higher. These houses are often established in large cities with comparatively low opera on offer. The North American houses are the archetypal examples of stagione houses.

Substantial differences remain between festivals such as Aix en Provence, Bayreuth and Glyndebourne, which stage a possibly high number of new productions over a period that may be very short, lasting

Table 3.3 Features of production modes

Number of houses included in the analysis	Number of opera performances	Revivals from previous seasons	Number of productions	Inhabitants per ticket	Cost per ticket	Cost per performance
Festival (3)	42	4 (10%)	6	1.4	186	459
Repertory (28)	152	104 (68%)	23	6	259	325
Stagione (21)	56	24 (43%)	6	26	302	404

Source: Statistical data gathered by the authors; figures presented at the annual *Opera Europa* meeting in Prague, November 2007.

just a few weeks, and stagione opera houses which extend their season to 11 months, such as the Barcelona Liceu, and repertory operas, such as most of the large German houses which continue to present the same opera productions for many years. The reality of opera houses' activities today no longer corresponds completely to these archetypes, but in fact combines them in a range of different ways. Between the 2009 Glyndebourne festival (6 operas, 75 performances on the main stage), and the Liceu in its 2008–09 season (10 operas, 97 performances), the differences are beginning to fade. Yet significant differences depend on the size of the respective seating capacities (1,200 versus 2,292) as the occupancy rates of both theatres is over 90 per cent.

Today, repertory and stagione models are combined at La Scala in Milan and at the Opéra National de Paris, and festival periods are being introduced into seasonal programming at venues such as the Opéra de Lyon and Madrid's Teatro Real. The July festival at Munich's Bayerische Staatsoper offers more than 20 operas which have been presented during the previous September/June period! In Germany, the repertory model still exists, but in many houses it has adopted a *block* programming system. It means, and this is a deep change against the post-war organization, that performances of a same production are grouped in one or two relatively short periods of time. During the same period of a few weeks, two or three opera titles would alternate. As a stagione effect, guest singers are better managed on short-term periods and quality goals more easily reached. The Staatsoper of Wien, Munich, Dresden and Stuttgart have each in their own manner entered such a system. Yet the two models continue to differ because they rely on production practices, traditions and perhaps in non-comparable performance magnitudes.

The learning process and alternation effects

Opera is a living art in which everything derives from learning: learning the repertory for conductors, musicians and singers; learning new staging arrangements and how to operate the scenery for singers and stage technicians. This learning takes the form of repeated rehearsals and is partially visible, recordable and almost measurable.

Repertory and stagione involve different production processes that can be differentiated both through the number of productions and performances per season and their learning process. Repertory houses draw several learning effect type benefits from their production modes (Tarondeau, 2008, pp. 55–74). They often perform the same operas, and the orchestras, chorus and solo singers in their ensembles are very familiar with the music and the productions. For the orchestra of a

German opera house, playing the prologue and the three operas in Wagner's Ring cycle is a fairly regular occurrence. Replaying a past production of *The Ring* or one of the operas from the cycle is no problem. At the Opéra National de Paris which is an alternating stagione opera house where the full Ring cycle has not been performed since 1953, staging the cycle between 2010 and 2012 as it is now projected will require orchestral preparation of a much greater intensity than at any German repertory house. The same observations apply for the chorus.

Due to the large number and high frequency of revivals of old productions at repertory houses, the number of rehearsals is limited and production rotation is accelerated. The sets, costumes and props for a production at a repertory house are prepared the morning of the evening performance. Everything is generally cleared away within hours of the end of the performance, and the sets for the next day's opera are installed the morning or afternoon before curtain up.

Alternation of productions

Depending on the production mode and volume, programmes are organized differently. The large repertory houses perform four or five different works in a week, while stagione houses only present one or occasionally two, and in Europe alternate operas with ballets and concerts.

Alternation is a necessity for houses staging a large number of works every season, but some houses present each one in a continuous run of performances. Each approach has its advantages and disadvantages. Not alternating, in other words, performing in continuous runs, means that an opera can only be performed one night in two, or else requires two casts of principal singers. Alternating avoids the need for two casts but lengthens the time in residence by guest artists. Alternating is only possible in opera houses that, either within their establishment or in its immediate vicinity, have enough room for set storage, transport equipment, and assembly and dismantling resources required for alternation of works and productions.

The opera houses in our sample are represented in Figure 3.1 by the number of opera performances (horizontal axis) and the average number of operas performed in alternation during the week (vertical axis). The two series of data are highly correlated (0.68), and the straight line determined by the least squares method reflects the "average" relationship between them. Opera houses above the line alternate more than this average and those below alternate less.

When there are under 80 performances per season, there are no more than two works alternating in a week except in festivals that offer few

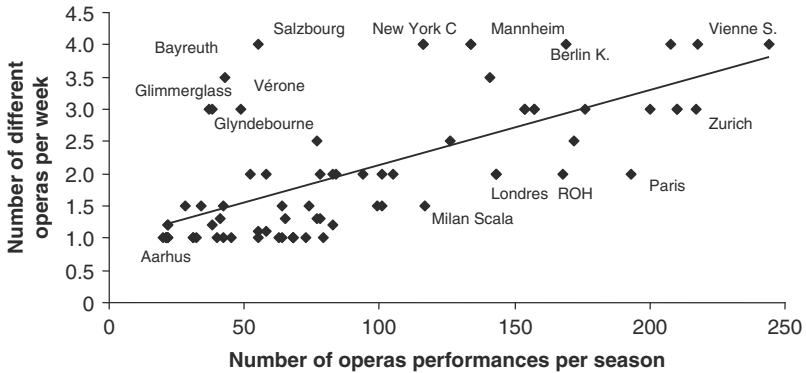


Figure 3.1 Alternation of operas

productions but make intensive use of alternation: 30–60 performances, but 3–4 different operas each week. Of course, the point is to present several operas in the space of a few days for audiences that have travelled especially to attend the festival. The aim of attracting a geographically distant audience fully explains this intensive alternation. When these festivals are eliminated from the statistical analysis, the correlation coefficient between production volume and alternation increases to 0.81.

But some houses are positioned far from the average line. Houses such as the New York City Opera (2005) and the Mannheim Opera appear to have higher-than-average alternation. Others, for example, La Scala in Milan, Covent Garden in London and the Opéra National de Paris show lower alternation than their production volume might suggest. Among many possible explanations, such as the number of ballet performances, the marginal cost of each stagione production, certainly heavier than in the repertory model theatres, together with the necessity to adjust the number of performances to their potential audience, the main difference might finally result in the basic difference of production policy still induced by each of the two models.

3. Opera productions and performances: the art of “assemblage”

While the invention and composition of operas demands proven skills in literary and musical creation and dramatic plotting abilities, the production and performance of operas requires collection and “assemblage” of many resources and artistic competences, particularly

instrumental and vocal skills. They also call on professional resources and know-how from a broad range of technical specialties, traditional and otherwise.

Assemblage: a constant across time

As the new art of assemblage that is opera has developed, advances in the arts and techniques able to contribute to successful productions and performances have always sooner or later found their way onto the stage. The first great set designers – Italians – were architects who designed and constructed the famous machines intended to represent the fantastic element of the opera: heaven and earth, a descent into hell, appearances of the gods. By the early 19th century it was possible to create an onstage illusion of an earthquake, a town on fire, a shipwreck. Over the last three centuries, the emphasis of the assemblages has sometimes been on the musical and vocal dimension of the works, as in Germany in the 19th and early 20th centuries, and sometimes on their theatrical and dramatic dimension, driven by stage directors with the contributions from the fine arts, costume design and lighting.

Some opera stages have benefited from the impressive advances of the last 50 years in scenery and set equipment. To give just a few examples, it is possible to move sets forwards and backwards, up and down or sideways using trolleys and self-propelled machinery, or on structures that can bear weights of more than 15 tons, and it has become quite normal to use composites in set construction, while costume making has become semi-industrialized. There is increasing interaction between opera production and multimedia production. Technology is unavoidable, on the stages of opera houses like anywhere else.

Two contrasting models, depending on the scale of permanent artistic and technical resources

Opera houses fall between two extreme models in management of opera production: the model of the fully integrated opera house that finances all the artistic and technical resources needed for its opera activities all year round, and the model of the opera house or company that has no permanent resources and must engage them all to produce and perform works.

The Festspielhaus in Baden-Baden in Germany (FBB), the Théâtre des Champs Elysées (TCE) in France and the Opera Theatre of Saint Louis (OTSL) in the USA are examples of opera houses that have no in-house

permanent artistic resources, but keep a highly professional skeleton technical staff. The FBB's operatic vocation was reaffirmed in the early 2000s as a component of the redevelopment of the theatre of one of Germany's richest spa towns. The TCE was opened in 1920 and the OTSL in 1964. These houses each stage some 20 performances every year of four to six different operas: four operas and 18 performances at the FBB in 2009–10, five operas and 18 performances at the TCE in 2009–10, and in the same season, four operas and 25 performances at the OTSL whose festival takes place over 2 months. None of these opera houses has its own permanent orchestra. The FBB and the TCE have a theatre permanently at their disposal with different administrative arrangements. The OTSL leases an auditorium at the University of Saint Louis. The activities of the first two houses are spread over the year, divided between symphony concerts, dance, recitals, chamber music and operas. The OTSL restricts itself to an opera festival. Given the size of its stage, orchestra pit and 2,095-seater auditorium, the FBB, unlike the TCE and the OTSL is able to present the most demanding works in terms of variety and number of musicians, singers and chorus, but also in terms of sets, costumes and props like operas by Wagner, Verdi, Richard Strauss and others. The FBB sometimes assembles productions and casts from houses such as Glyndebourne (*Tristan und Isolde* in 2007) or the Mariinsky Theatre (*Il Viaggio a Reims* in 2010), and often calls on the services of the Münchner Philharmoniker. The role of the three houses is always to assemble all the external artistic and technical resources necessary for each production, either separately or combined.

Conversely, houses of such varying sizes as the Vienna Staatsoper, the Bayerische Staatsoper in Munich, the Aalto-Musiktheater in Essen and Erfurt's Theater have permanent, large- or medium-scale in-house artistic resources – musicians, choruses, singers – and technical resources. These houses give between 100 and 233 performances per season. They have at their disposal the theatres and stage crews necessary for preparing production and performances, and workshops for set construction, costumes and props. This gives them guaranteed technical independence. Yet they still bring in external artistic resources for their opera programmes: various soloist singers, conductors and stage directors. Baden-Baden's Festspielhaus, the Théâtre des Champs Élysées and the Opera Theater of Saint Louis all outsource their artistic and technical production. The Vienna Staatsoper, Munich's Bayerische Staatsoper and the Aalto-Musiktheater in Essen execute a considerable share of production in-house.

Between these two models, a large variety of assemblage approaches

In any opera house, the management of assemblages is the keystone of the artistic, technical and financial aspects of the organization. The choices range from programming to artistic and technical decisions, all of them depending on the format of the in-house resources, all of them having a financial dimension.

Assemblages of season productions

This issue has often been visited, but needs to be emphasized. The choice of works programmed in a given season as seen earlier, responds to an artistic vision, expected box office income and estimated production costs. When Hugues Gall opened his first season in 1995–96, he began with Verdi's *Nabucco*, a warhorse. He followed with Kurt Weil's *Aufstieg and Fall der Stadt Mahagonny*, a 20th-century, accessible opera which was premiered at the Opéra National de Paris. Then Tchaikovsky's *Yevgeny Onéguin* came, not considered as a warhorse from the box office point of view though a masterpiece. It was Christmas time and Puccini's *Bohème* arrived. The first and fourth operas targeted a very wide audience as these two titles are very popular. The second was more specific and somehow more difficult in box office terms. The third, a great classic, is not as popular as one and four. Out of the four productions, *Mahagonny* was the heavier in terms of all kinds of required resources. During 4 months, four stage directors overlapped on the back stage: Robert Carsen and Graham Vick, then Willy Decker and Jonathan Miller. Each of them had his team, partly outsourced, partly composed of in-house technicians. During the same weeks, all the artists involved prepared the productions and the performances. All the necessary assemblages had been planned in detail 12 months before. This overall artistic and technical assemblage was also connected to a box office goal. That is just daily life in opera production.

Opera houses' resources are limited. Everything is not possible. In good management terms, choices have to be made. Gluck's *Orphée et Eurydice* needs three principals with fairly common vocal tessitura, a small chorus and an orchestra that needs no more than 50 musicians. Presumably this would cost much less to produce than Wagner's *Götterdämmerung*, which requires 12 soloists, seven in very vocally demanding roles, a large chorus and an orchestra of nearly 100 musicians. These two extreme examples correspond to the amplitude of production costs ranging from 1 to 30 in a large stagione house, and

perhaps more. This is just an example but programming decisions have to consider these issues, and prepare long in advance the necessary decisions. One does not easily find the suitable Brünehilde and Siegfried of *Götterdämmerung*. Let us review some of the main resources to be assembled.

Orchestras

Whatever the viewpoint and for evident artistic reasons, an orchestra is one of the main components of an opera house if not its soul. "The orchestra is the more important man of the opera house", used to say Hughes Gall. Sometimes when an opera performance ends, the orchestra applauds the stage. It means without any doubt that it was a magic performance, and, let us say, a very successful assemblage. Let us review several orchestra issues: in-house permanent orchestras; temporary orchestras; outsourced or associated orchestras; shared orchestras. They mainly depend on the number of season productions.

Opera houses with high volumes of activity (130 performances or more a year) generally have their own pit orchestras. This is the case at the New York Metropolitan Opera, and almost all European opera houses staging 100 performances or more each season, dominated in terms of numbers by German and Austrian houses. Traditionally, orchestras have historically been and still are the "hearts" of German and Austrian opera houses. The German opera houses are divided into three groups according to the number of musicians of their orchestras: Group I (fewer than 60), Group II (between 60 and 90) and Group III (more than 90). These orchestras devote 80–90 per cent of their time to playing in the pit, and 10–20 per cent to symphony concerts. More than 40 opera houses follow this pattern. Of the 105 North American opera houses, only five have their own pit orchestra. The members of the orchestra are hired and paid for seasons lasting 35 weeks at the New York Metropolitan Opera, 24 weeks at the Lyric Opera of Chicago and 22 weeks at the San Francisco Opera Association. Coherence is there: permanent in-house orchestras are present in opera houses with heavy seasons of 150–200 or more performances; temporary orchestras are assembled for stagione seasons and a smaller number of performances are given.

The existence of temporary or shared orchestras may be explained either by low volumes of opera performances or by administrative considerations. Amsterdam's Nederlandse Opera, even though it stages nearly 100 performances every season, Geneva's Grand Théâtre, the Leipzig Opera, the Capitole in Toulouse and Strasbourg's Opéra du Rhin are all examples of opera houses that do not have their

own orchestra. The Dutch state, the cities of Geneva, Toulouse and Strasbourg separately fund their opera houses and different orchestras: the Concertgebouw and the Netherlands Philharmonic, the Orchestre de la Suisse Romande, the Gewandhaus in Leipzig, and the Toulouse and the Strasbourg Orchestres Symphoniques in Toulouse and Strasbourg. Each funding public organization requires the orchestras they finance to play a set number of times for the opera houses they also fund. Strasbourg's philharmonic orchestra thus spends 50 per cent of its time playing for the Opéra du Rhin, and the Concertgebouw accompanies one opera production every year at the Nederlandse Opera, which also benefits from the services of other orchestras, more specially the Netherlands Philharmonic. Such arrangements make sense but their effectiveness depends on how they are managed. At Toulouse, over the last 15 years the same deputy director Robert Gouazé was the administrator of both the Capitole and the symphony orchestra for both its opera and concert activities, alongside artistic director Nicolas Joel. The harmonious working relationship between the two men was legendary, and whether or not by coincidence, the symphony orchestra's concerts were as highly praised as those of the pit orchestra, many of them conducted by Michel Plasson. When, on the other hand, the orchestra is directly under the authority of the city council, as is the case in Strasbourg and Leipzig, there is always a risk that programming will give more priority to concerts, to the detriment of pit performances. A great deal depends on the pit conductors and their charisma, the musicians' convictions (or lack of conviction) that they are working under a competent baton, and the interpersonal skills of all the people involved in orchestra management. In Leipzig during 2005 and 2006, the difficult relationship between the opera house Intendant and the musical director of the Gewandhaus orchestra led to a conflict that only ended when the Intendant left (see Chapter 8 on crises). The OTSL uses the services of the Saint Louis Symphony Orchestra for the four productions and 20 performances of each of its annual seasons. This annual contract accounts for 20 per cent of the OTSL's total budget.

Opera festivals stand apart in their organization arrangements, both in Europe and the USA. The Bayreuth and Santa Fe festivals have certain points in common. The first puts 7–8 works and 40 performances over 6 weeks, the second 5 works and 30 performances in a similar period. Since they first began in 1876 and 1954, respectively, the management of these festivals has put their orchestras together from musicians who belong to the many German orchestras for Bayreuth or American orchestras or musicians in the case of Santa Fe. Recruitment standards are very

high, and the musicians hired from 1 year to the next often play under prestigious conductors, from Leonard Slatkin to James Levine, Daniel Barenboim to Pierre Boulez. The consistent standard of the orchestra assembled for Bayreuth is also the result of its unchanging repertory, which is restricted to Wagner's ten main operas. The Glyndebourne festival celebrated its 75th anniversary in 2009. Two guest orchestras regularly play there, the London Symphony Orchestra and the Orchestra of the Age of Enlightenment for baroque operas. Orchestral consistency is enhanced when the musical director is involved in the long term, like Vladimir Jurowski at Glyndebourne since 2000.

Other specific issues appear with the so-called baroque repertoire, which goes together with specially designed musical instruments. Opera houses deciding to produce baroque opera titles often invite leaders of baroque existing ensembles of singers, choirs *and* orchestras to have a global role in such productions. In France and abroad, well-recognized baroque specialists act as much as conductors as global musical and vocal producers. William Christie, René Jacobs, Marc Minkowski, Emmanuelle Haïm, Jean Christophe Spinozi and many other bring opera houses their own assemblages.

Music directors

While the orchestra management at American and European opera houses varies, most of them have a musical director who acts as conductor and is involved in one way or another in the artistic direction, for example, James Levine at the New York Metropolitan Opera, Daniel Barenboim at the Berlin Staatsoper, Sir Andrew Davis at the Lyric Opera of Chicago, Patrick Summers at the Houston Grand Opera, Antonio Pappano at Covent Garden, Fabio Luisi at the Dresden Semperoper who will be replaced by Christian Thielemann in September 2010 or Philippe Jordan at the Opéra National de Paris. In Essen, Stefan Soltesz occupies both the functions of Intendant and Generalmusikdirektor. The artistic and managerial influence of music directors is reflected in the number of services they provide. As of 15 March 2009, James Levine, for instance, had conducted no less than 2,382 performances at the Metropolitan Opera since his arrival in 1971! Since 1880, the year the Metropolitan Opera opened, probably no other conductor anywhere in the world has equalled this "score". La Scala in Milan has been without a musical director since Riccardo Muti resigned in 2005. The general managers and administrative directors of opera houses, together with the musical directors, oversee the programming for orchestras' opera and concert

activities. In Europe, this organization is generally considered satisfactory by the managers, but not always by the orchestras, which are often keen to have more independence. Also, certain orchestras enjoy a degree of self-management which is not incompatible with appointment of a music director by the opera house. At the Teatro Real in Madrid, Jesus Lopez Cobos is at the same time musical director of the opera and chief manager of the independent orchestra which provides its services to the opera.

Orchestras and choruses' financial issues

Orchestras and choruses are both necessary and costly. The French conductor and opera company manager of La Grande Ecurie et la Chambre du Roy baroque ensemble, Jean-Claude Malgoire, has expressed the problem in humorous terms: "What can we do all the time with the harp and the tuba?" The format of a permanent opera has ideally to be defined given the works mostly played. Many European opera houses are careful to limit the overheads generated by their artistic ensembles. The different sections of the orchestra are not all needed to the same extent. While full-time staff numbers are never independent of activity volumes, chorus membership depends on factors as different as the frequency of chorus parts in the operas to be performed, the chorus size required (which varies with the opera), the auditorium size and also the amount of music to be learned in foreign languages when there is a large number of new productions involving choruses. The Covent Garden chorus has fewer than 50 permanent choristers. Additional singers are engaged on a fixed-fee basis whenever a production requires more.

Soloist singers

The practices adopted to select soloists for the principal or secondary roles reflect highly contrasting approaches, influenced by different traditions and rationales. Keeping a permanent ensemble of singers is part of the tradition at opera houses in Germany and the German-speaking zone, where the logical link between ensembles and repertory houses is powerful. Before the Second World War broke out, many European opera houses had permanent troupes of singers. There are fewer singers in the ensembles at German houses than 30 years ago, but they do still exist. They fulfil programming requirements marked, as we have seen, by the highest production and performance volumes in the world. They provide young singers from all over the planet with exceptional opportunities for learning. Professor Gerd Uecker, the Intendant of the Semperoper in Dresden, considers this a typical feature of the landscape

of German opera houses. But these houses are not deaf to audience demand for divas, German or otherwise, and the ensembles alone do not meet all their needs for solo singers. German and Austrian repertory houses, both large and smaller, mix their internal casts with guest artists. Their aim is to equal the appeal of the large stagione houses in the neighbouring capitals. In July 2007, the Semperoper produced a *Rigoletto* directed by Nikolaus Lehnhoff. The cast for the first few performances boasted three guest singers, including Diana Damrau and Juan Diego Florès. The other roles were sung by members of the permanent ensemble. The casts for certain 2009–10 season performances at the Semperoper include guest singers such as Angela Denoke, Rainer Trost, Emily Maggee, René Pape, Kurt Rydl, Jan-Hendrik Rootering, Wolfgang Schmidt and others, who all perform on many other European and American stages. At the Theater Erfurt in 2009, nine of the ten roles in Kurt Weill's *Aufstieg and Fall der Stadt Mahagonny* were performed by singers from the ensemble, and the tenth by a guest artist, Karen Armstrong. During the same season, all the roles in Wagner's *Parsifal* were given to singers from the ensemble.

In contrast, hardly any French, English or Spanish opera house has an in-house staff singer who will be awarded a title role, and the same is generally true for the American houses. Those that have training centres for young singers often give certain students small roles, and can sometimes “rescue” the cast if a principal is unable to perform.

Economically, it would be interesting to estimate the total financial cost of ensembles and freelance singers for a given opera house season production, then to roughly calculate the hypothetical total cost which would be incurred if no in-house ensemble would exist. Without questioning the value of the learning made possible by permanent ensembles, assessment of the relative cost of ensembles compared to freelance singers and changes in that cost over time would provide a valuable indicator.

Other Assemblage issues

Data on assemblages, which are artistic and technical as much as financial, are partly determined by the situation of opera houses at the time examined. Their volume of activity determines the quantity and quality of artistic and technical resources presumably required by the programme. There is nearly always room for manoeuvre. The sumptuousness, sophistication and cost of a production can vary. The choice is difficult: a conscientious opera house manager cannot ignore their

audience's visual expectations. If the aim is to create a long-running production, they know that a commensurate cost will be involved. Joseph Volpe has discussed this issue at length. The budget depends on the choice of stage directors and designers. Budgets for external producers can be more or less strictly defined and supervised. Other less visible examples illustrate this. Does an opera house have its own workshops for set-building, costumes and prop making? Having them made elsewhere is an unusual decision in such circumstances. Are several potential suppliers always contacted for purchases? Does the opera house have its own permanent ensemble of singers? Using guest singers is a major decision in such cases. In a comparable example, an opera house with 100–200 opera performances per season has a permanent orchestra often supplemented by additional musicians, and a budget which in theory precludes the need to engage external orchestras. If, for specific opera or dance productions (baroque operas for example), this house makes the unusual decision to call on one or more external orchestras, the decision will involve consideration of aspects both artistic – is it necessary, is it desirable? – and financial – what additional costs will it generate, how will it affect the house's financial balance?

The choice of guest singers to take the title roles is obviously crucial. It involves forward planning of casts, often several years in advance, a sound capacity to pick voices suited to the roles, a risk of voices changing when commitments are made several years before the actual performances, and a good match between the voices and the acoustic qualities of the auditorium. It also requires sound talent-spotting skills to identify singers who will be tomorrow's Lisa della Casa, Eleanor Steber, Hans Hotter or Ben Heppner, as well as an ability for accurate estimation of the fees the house is prepared to pay or can negotiate. Are the contracts defined in advance like the programming? The earlier they are drawn up, the easier it is to negotiate fees! The quality of personal contacts between opera house managers and singers also plays an important role.

Highly variable distribution of powers of assemblage

The powers of assemblage correspond to creativity and organization matters that may be concentrated in a few pairs of hands or spread among a larger number. The omnipresence of both the artistic/technical and financial aspects is enough in itself to classify assemblage decisions as a "nerve-centre" role. While there is an infinite variety of organizational arrangements for artistic and technical production, responsibility for decisions lies with four families of professionals: the opera house

general managers themselves, assisted by in-house artistic and technical teams; the conductors, some of whom are also music or artistic directors; the production stage directors and the professionals who work with them; and the technical managers in charge of the stage and workshops when relevant.

Some opera house general managers are personally very involved in artistic and technical decisions, advised by specialists where necessary. Dominique Meyer is proud of this aspect of management at the TCE. When Hugues Gall headed the Opéra National de Paris, he took many decisions himself and personally oversaw their execution.

Conductors of all statuses may have considerable responsibilities regarding selection of artists, and even in preparing productions. Karajan was one of the most efficient. Barenboim has often explained how much he liked being able to work with the same artists in the long run, in a range of operas. Some stage directors make no secret of their interest in the choice of singers: Francesca Zambello, for example, has expressed her liking for Broadway productions where she is also in charge of choosing the actors. Certain experienced members of opera house management teams and a whole variety of external professionals have acquired a worldwide reputation for their knowledge of the opera singers' universe, their capacity to spot new talent, the right voices for a role at a given time. Well-known examples are Joan Ingpen at the New York Metropolitan Opera, Paul Mœ for the Munich Staatsoper, the Glyndebourne festival and the Chicago Lyric Opera, and Eva Pasquier Wagner, currently co-director of the Bayreuth Festival with Katarina Wagner.

Other major decisions involve other types of power-sharing: the choice of stage directors and the professionals who assist them, who are still called "external producers" because they ply their trade from one opera house to another, and are not restricted to opera but also work in spoken theatre; the choice of set designers, costume designers and lighting designers. They have formal power on the stage and in preparation of productions to which they are assigned.

The choice is primarily based on the opera houses' managers' own artistic views, on the stage managers' reputation, and also depends on the fees an opera house is prepared to pay and the availability of the people concerned. It is also based on aesthetic and cultural considerations, and the management's concern to take a classical approach or to aim for innovation, or possibly provocation. Directors as talented as Willy Decker, Christian Marthaler, Francesca Zambello, Robert Wilson, David MacVicar and others have totally different and sometimes

antagonistic styles and visions. Globalization also applies to stage directors. The best known among them work in the greatest opera houses. A stage director can be just as much a draw for audiences as a well-known cast. The fame of Bayeuth's 2008 production of *Parsifal* owes much to Stefan Herheim's original vision of the work. Practical concerns also come into play. Hugues Gall used to like engaging Robert Carsen and Francesca Zambello because they were familiar with the Garnier and Bastille theatres' back stage facilities and knew how to elicit the best from the theatres' technical and artistic management, motivate the teams and create a good working atmosphere.

The relations between opera house general managers and stage directors are never immune from tensions or even power struggles. In his autobiography, Joseph Volpe describes some colourful, almost unbelievable quarrels with the primary "assemblers", the stage directors. Bernard Foccroulle considers it part of his role to oversee the development of relations between his own staff, artists and external producers who can foster the climate of creativity that in his opinion should reign over any opera production.

From the points of view expressed by the opera house managers interviewed, the "market" for stage directors appears to be slowly but surely undergoing renewal. This conclusion highlights the intuition and flair of opera house managers in identifying new talent.

The technical directors in charge of the stage and workshops, or purchasing, also have decisive responsibilities in technical choices.

From outsourcing to co-productions

Rossini's *Cenerentola*, which was seen by Spanish and Catalan audiences at the Barcelona Liceu, Swiss audiences at the Grand Théâtre de Genève and British audiences at the WNO in Cardiff in 2007, 2008 and 2009, is a co-production by all three opera houses. They pooled their resources and facilities to share the costs and possible risks of the production, designed to be transferred between their three theatres. Co-productions of operas by several opera houses are just one of the forms of collaborative cooperation between operas, but in view of their ongoing expansion one of the most important. Other relations between opera houses take the form of rentals of all or some existing productions and, less frequently, outright sales and purchases of entire productions or parts of productions.

Co-productions meet a range of concerns, above all economic and financial considerations. At best a co-production is considered to save 10–30 per cent on the production costs that would be borne by an opera

house acting alone. The chief components of the cost of a co-production are the costs of making sets, costumes and props, as well as fees payable to external contributors: stage directors and the designers of sets, lighting and costumes. Depending on the circumstances, all or some of the cast costs are included when the cast is transferred from theatre to theatre, which is a statistically rare occurrence. There are all sorts of other considerations on top of financial advantages.

At the Lyric Opera of Chicago, William Mason thinks co-productions are always sensitive enterprises, and they are mainly justified for productions that are not intended to be replayed in future seasons in his theatre.³ The financial arguments are tinged with psychological considerations. One former director of many European opera houses has declared that being in charge brings greater motivation than being just one member of a co-production.⁴ More and more opera houses have become used to buy, rent or borrow opera productions from other opera houses, mainly foreign houses, over recent years. "Co-productions," says Professor Uecker, "only make sense when they concern contemporary or unusual works for which the audience is foreseeably limited."

A house of local or regional repute will be keen to mount a co-production with houses such as Covent Garden, the New York Metropolitan Opera, La Scala, the Opéra de Paris, the Washington National Opera or the Houston Grand Opera. The operation reinforces their own reputation, and that can only be flattering for their funders.

Co-productions remain demanding in all respects. This is one of the reasons why acclaim for a successful co-production is rarely undeserved in terms of either finance or quality. A co-production almost always begins with mutual trust between the opera house general managers and their principal colleagues. Success first depends on a sound capacity to estimate the time required, expert knowledge of the many artistic and technical aspects of co-production, the draft schedules for performances in the various theatres, and negotiation and signature – in due time – of the contract with singers and conductors, for each opera house in turn. Two key success factors are (1) using contracts that comply with the law of the contracting houses' countries and clearly specify how financing is to be shared and (2) all-encompassing, meticulous technical preparation of all aspects of the production. At the opera, just as in industry, producing something collectively is always more difficult and allows less freedom than producing something alone. Technically speaking, it is vital to plan how the set will be adapted for stages that often differ in size, even if only slightly. Certain stages have similar dimensions: for example, the stages at Amsterdam's

Het Musiektheater, the Opéra Bastille and two of the venues used in Salzburg, the former summer riding school (Felsenreitzschule) and the Great Festival Hall (Grosses Festspielhaus). These comparable stage sizes facilitate co-production decisions. It is equally important to take the secondary costs of co-production into account: transport costs, the cost of adjusting sets, costumes and even props to different theatres, having teams at each house to carry out the adjustments and the additional labour costs that may result. Task sharing requires a good working relationship between teams. There are sometimes tough discussions over cost assessment methods.⁵ Complementarities between houses, where they exist, make collaboration easier. The TCE and the Opéra du Rhin co-produced *La Incoronazione di Poppea* in 2007. The TCE has hardly any workshops, whereas the Opéra du Rhin has its own staff for all the crafts required in opera production. The terms of the agreement were easily reached for the division of tasks and technical matters, and were only arduous regarding financial matters.

Which opera houses are involved in co-productions, and with what intensity; which houses never or only rarely participate in co-productions; how are co-productions, in-house productions and outsourced productions of opera combined? Some houses systematically co-produce. The most striking example is the Gran Teatro del Liceu in Barcelona. In the last five seasons (2004–10), 38 of the 43 operas performed on the main stage at the Liceu have been co-produced with a large number of European and North American opera houses. It is a long tradition that was already dominant before 1980. The Catalan theatre has never made vertical integration its general policy. However, historians of the Liceu emphasize its focus on the greatest voices throughout its history. We can imagine what the Liceu's budget might be if all its productions were entirely developed in-house. Assuming the cost of an in-house production is an average 15 per cent higher than the cost of a co-production, the overall surplus annual cost would be approximately €3 million, which the Liceu would not be able to devote to other aspects of its strategy.

As we have seen, there is a general trend towards more co-productions. According to the survey of opera in France by the *Réunion des Opéras de France*, 45 per cent of all new French opera productions in 2007 were co-productions. Three UK houses have adopted co-production as a major strategy for opera: the WNO based in Cardiff, Opera North in Leeds and the Scottish Opera in Edinburgh. These three houses all take their productions on tour around their respective zones of influence. The number of performances given by the WNO in Cardiff during the

2007–08 season was 34 for eight different operas, but it performed the same productions 73 more times at venues in ten other cities. These three houses have not only built up extensive experience in (quickly) adapting sets for a given production that will tour to various theatres, they have progressively learned to design or commission sets that can be adjusted to a wide range of stage types. It is not surprising that the same houses have simultaneously developed expertise in co-productions. All three of them have their own workshops for sets, costumes and props. The WNO seeks to design and negotiate potential co-productions with other companies or houses a long time in advance. Similar situations can be seen elsewhere in Europe, although on a smaller scale.

Because co-productions reduce costs, they appeal to a growing number of houses, including the largest such as the Opéra National de Paris, Covent Garden and La Scala, but also houses with lower volumes of opera activity such as Opéra de Lyon, the Teatro Regio in Turin and the Opéra de Bordeaux, which have to optimize expenses and sometimes cope with budget cuts. The growing proportion of rentals, purchases and co-productions in Europe and North America is even appearing on the websites of many opera houses, with special pages on the catalogue of their productions available for rental or sale. The *Opera Europa* association has set up a technical club open to members that plays an active role in developing co-productions. The professional website Operabase, meanwhile, maintains a list of opera productions available across the world.

4. Cost comparisons: difficult but essential

The opera activities of different opera houses can only be compared economically based on an understanding of their costs, and of course the origins of their funding. The value of the exercise is challenged by those who consider that tax rules, labour costs and legislation are too different between countries to allow significant comparisons. Of course, the need for methodological caution must be acknowledged. Plenty of arguments can be put forward against any attempt at cost comparison. We take the opposite position, convinced that methodological difficulties might be progressively overcome, comparisons are useful as a lever for progress and that opera houses can learn from each other. We shall thus begin the process, taking care to ensure our methods remain transparent. The following is a beginning.

Comparison of unit costs – cost per performance, cost per ticket sold and cost per production – requires consistent assessment of artistic

activity volumes across all houses. As we have seen, the degree of diversification in artistic activities varies widely between them, and this is what causes the difficulty of comparing unit costs for each type of activity. Only very few opera houses have cost accounts analysing the full cost per type of production, especially in Europe. This means unit costs can only be estimated based on simplifying assumptions, which provide results but with a risk of distortion.

The first usable method is based on the data available from four large opera houses: the New York Metropolitan Opera, the Vienna Staatsoper, the Bayerischeoper in Munich and the Opéra National de Paris (Palais Garnier and Opéra Bastille). These data were collected by us in 2004. For box office income, while seat occupancy rates are similar for opera and ballet, the average ticket price for opera is generally twice the average ticket price for ballet. We can thus assume that, at the time, the box office income for a ballet production was half the box office income generated by an opera. The two theatres used by the Opéra National de Paris provide a benchmark for cost comparisons. Average fixed production costs are five to six times higher for operas than for dance, and variable costs per performance are three to four times higher. On this basis, we can posit the simplifying hypothesis that in terms of costs, one opera performance is equivalent to four ballet performances. Extending this approach and method to other activities could express all opera house activities as an “opera equivalent”, or activity index. Since accounts by activity are not available, this admittedly coarse method could be applied provisionally to a diverse range of houses.

Another possible method may be applied in houses with low volumes of non-opera activities. Given their relatively low share of box office income and costs, the volume of activity can be measured directly by the number of productions and performances of operas. Of course, the scope of application of this method would be restricted to undiversified houses. Each of these methods leads to similar results in cost comparisons.

Analysis of cost structures compares the relative shares of resource consumption by opera houses. The two types of comparisons – unit costs and cost structures – show constants and differences between opera houses.

Cost per performance

The statistical sample of opera houses has been divided into three groups: the first group contains houses with total average cost per

Table 3.4 Comparison of cost per performance

	Group 1	Group 2	Group 3
Performance cost in €	>400,000	300–400,000	<300,000
Average performance cost in €	572,000*	335,000*	181,000*
	629,000**	373,000**	194,000**
Number of performances	76	132	120
Number of productions	11	21	15
Number of revival performances	42	77	84
Average ticket price	80	59	32
Population/ticket offering***	24	11	9
Average seating capacity	2,572	1,710	1,390

Note: *Average performance cost computed using our activity index as the measure of performance numbers; **average performance cost computed using opera performances as the measure of activity volume; ***inhabitants of the area offered one ticket during a year or a season.

performance of over €400,000, the second group of houses has average cost per performance of between €300,000 and €400,000 and the third average costs of under €300,000. Average values for these groups have been calculated and clearly illustrate the differences between them.

Table 3.4 shows that the average cost per performance only varies by 6–10 per cent, depending on whether it is assessed based on the activity index or the number of opera performances. The averages are not therefore affected by the assessment method. However, they should be viewed with caution for houses whose programmes for all activities are significantly different from average programmes.

The cost per performance is higher when the number of performances is low, and when few works are performed and there are few revivals of old productions. Statistically, the repertory opera houses have lower costs per performance than stagione opera houses. This difference is partly explained by the savings resulting from scale and learning effects.

Large-capacity theatres result in high cost per performance. This can be called the “size” effect: the greater the size of the stage, the higher the costs of set design and direct performance costs.

The opera houses with the most expensive performances are also subject to low competitive pressure and have the highest average ticket

price. An environmental effect is visible: most of the large North American operas, with high seating capacity, high ticket prices and low opera availability are in Group 1.

Cost per ticket sold

As previously done, the opera houses comprising the sample are classified into three groups with respective costs per ticket of over €300, between €200 and €300, and under €200. The averages of the groups are presented on Table 3.5.

The cost per ticket sold, which is the total budget divided by the number of tickets sold, is naturally lower, all other things being equal, when more tickets are sold. But the dominant scale effects are associated with auditorium size and seat occupancy rate. An identical number of tickets sold may be achieved in different ways: by staging a greater number of performances or by filling large-capacity theatres less often. This is an important consideration. Many German opera houses with a large number of performances in relatively small theatres are in Group 1. Many North American opera houses with a small number of performances in large theatres are in Group 3.

Financial autonomy – the ratio between ticket price and ticket cost – is stronger when the ticket cost is low.

Cost structure

Comparison of cost structures involves different problems from unit cost comparisons. The accounting or management control standards vary between countries, data collection agencies and sometimes even opera houses. Data realignment is a risky exercise that can distort analyses.

Table 3.5 Comparison of cost per ticket sold

	Group 1	Group 2	Group 3
Ticket cost €	> €300	€200–300	< €300
Average ticket cost €	416	235	151
Number of new production performances	40	16	23
Seating capacity	1,304	2,121	2,327
Number of tickets sold	121,936	162,488	173,865
Financial autonomy (%)	15	26	31
Occupancy rate (%)	73	82	81

Table 3.6 Cost structure of North American operas

	Average for North America	New York Metropolitan Opera	Small opera houses*
Personnel expenses (%)	69	77	54
– artistic personnel	35	37	25
– technical personnel	21	28	12
– sales and administrative personnel	13	12	17
Other expenses (%)	31	23	46
– technical expenses	12	7	20
– administrative expenses	19	16	26
Artistic expenses/total	35	37	25
Technical expenses/total	33	35	32
Admin. expenses/total	32	28	43
Cost per performance x \$1,000	714	1,137	180
Cost per ticket sold (\$)	266	307	168

Note: All values are expressed as a percentage of total costs. *Groups 3, 4 and 5 as presented in Figure 1.1.

Therefore, cost structures are analysed by geographical zones presenting homogeneous data: North America, using the data collected by *Opera America*; the German-speaking zone, using the data from *Deutscher Bühnenverein*; and the rest of Europe, using the *Opera Europa* database which is in a development phase.

Table 3.6 is devoted to North American operas. A cost structure emerges in which artistic, technical and administrative costs each account for approximately one third of total expenses. On the artistic side, the Chicago Lyric and Salt Lake City operas spend more; the Santa Fe, Detroit and Miami operas spend considerably less. The “small” houses have close to average percentages of technical expenses, but their administrative budgets are, in relative terms, noticeably higher than in the large houses, to the detriment of artistic expenses.

Across all houses, personnel expenses represent 69 per cent of total expenses. The New York Metropolitan Opera is well above this level, with 77 per cent of personnel expenses. The “small” houses are well below, with only 54 per cent. Clearly, the large opera houses are tending to incorporate the resources they need to assemble for their productions in-house, whereas the smaller houses draw these resources from

the market. However, there are exceptions among the large houses, for instance, Detroit, Miami and Santa Fe, which make extensive use of external resources.

The data for the German-speaking zone are organized differently. Personnel expenses are separated from other expenses but include expenses relating to non-permanent personnel, which in the data for the North American houses are classified as purchased resources. Also, non-personnel expenses are not broken down between the artistic, technical and administrative expense categories. The “three thirds” rule observed in North America cannot therefore be confirmed – or invalidated – by examination of the German-speaking zone.

In just a few examples, Table 3.7 shows the extreme diversity of opera houses in the German-speaking zone. While the Berlin Komische Oper is close to the average position for the houses studied, it stands out for its higher proportion of artistic personnel expenses. The Semperoper Dresden is the most strongly integrated: 88 per cent of expenses are for personnel, including 18 per cent for non-permanent personnel. This is a similar situation to the New York Metropolitan Opera, although

Table 3.7 Cost structure of German opera houses

	Average	Berlin Komische Oper	Munich Bayerische Staatsoper	Semperoper Dresden	Theater Erfurt	Bühnen der Stadt Köln
Personnel expenses (%), comprising:	72	73	79	88	60	59
– artistic personnel	33	43	36	42	31	18
– technical personnel	22	17	19	24	19	23
– sales and administrative personnel	8	5	4	4	5	19
– non-permanent personnel	12	9	21	18	5	0
Other expenses (%)	28	27	21	12	40	41
– financial expenses	2	3	0	0	2	0
Cost per performance x €1,000	373	247	479	277	305	427
Cost per ticket sold (€)	206	177	151	125	184	173

we have no details of the share of non-permanent personnel at this opera. One striking difference: while some North American operas report significant financial income through endowments providing a quite large, stable portion of their resources, at least in quiet economic periods, the German operas report (admittedly modest) financial expenses.

Opera Europa member houses, the vast majority of them European, show an even greater diversity. The Nederlandse Opera in Amsterdam is close to average figures, with 72 per cent of personnel expenses including 30 per cent for artistic personnel and 17 per cent for technical and production personnel. But the former Eastern European houses such as the Prague Statni and Warsaw Wielki, and also the Tokyo Opera, are radically different from the average. Prague and Warsaw produce everything in-house, with very low unit costs – probably destined for rapid growth in the future – and have very low costs per performance and per ticket sold. The Tokyo Opera, in contrast, produces very little in-house and has very high unit costs.

The three other European opera houses shown in Table 3.8 have unit costs of average size, but very different cost structures. Is this the result of different strategic choices or different accounting presentations? Both presumably. To take the example of accounting presentation, Madrid does not include its orchestra in personnel expenses, and the

Table 3.8 Cost structure of European opera houses

	Average	Amsterdam	Prague	London ROH	Madrid	Tokyo
Personnel expenses (%), comprising:	70	72	94	63	47	36
– artistic personnel	33	30	28	12	15	16
– technical personnel	16	17	5	2	3	3
Other expenses (%)	30	28	6	37	20	64
– technical expenses	7	18	6	8	–	7
Cost per performance x €1,000	389	456	25	312	464	762
Cost per ticket sold (€)	314	237	36	200	289	547

Amsterdam Opera only bears part of the expenses incurred by the theatre. To take the example of strategic choices, Covent Garden keeps a chorus and a permanent orchestra of reasonable sizes in view of the dimensions of the theatre and its production volume, but supplements numbers as and when required by its programme.

At the end of this chapter on opera houses' artistic and production policy, many facts are clear. But all the conclusions, even firmly established statistically, have many exceptions.

Opera on offer is concentrated all over the world, but the concentration is higher in North America than in Europe. Peter Gelb's predecessor Joseph Volpe (2006, p. 250) stated that in 2006, the Metropolitan Opera represented almost 30 per cent of all American opera houses' expenses. The houses with high volumes of activity, staging more than 130 opera performances per season, are also the houses that put on the largest number of works, new productions and revivals, the largest number of ballets, concerts and other activities aimed at new audiences, but they do not often work in cooperation with partners, and do the least touring. These houses benefit from economies of scale and learning effects, explaining how their cost per performance and cost per ticket sold is lower than at houses with less volume "output". They may, however, suffer from inflexibility due to the high degrees of vertical integration. Smaller houses are less affected by this and can adapt to unforeseen circumstances by calling on the market.

History has handed down three production modes – repertory, stagione and festival – which despite the technological and artistic upheaval of the last few decades still survive after a little adjustment. The repertory mode is still with us in Germany, Austria and Eastern Europe. It has significant advantages for learning, but leads to an excessive offering meaning that modest-sized theatres are not filled. The stagione mode reigns in North America and Europe, apart from the German-speaking zone and the major national and regional capitals, but many of its original features have been lost. Past productions are revived in the same way as repertory operas, and festival periods are being added. Such arrangements are known as "semi-stagione" or "alternating stagione" patterns.

It is the medium-sized houses that are most involved in co-productions, which offer advantages in terms of cost but also carry a risk of loss of identity for the less prestigious partners. The largest houses generally control all the resources assembled in operas, and ensure the continuing use of the many crafts required. This tends to make financial equilibrium a delicate exercise.

The artistic and technical production of operas ultimately depends on factors so wide ranging: from the specific environment of large countries to the specific traditions of every country, from the size of theatres and their volumes of activity to their audience's expectations, from financial resources to control of management, that one can constantly wonder whether the constraints applicable to opera houses do not outweigh the margins of manoeuvre left open to them. The answers appear clear. The margins for manoeuvre exist. The choice of artistic and technical policy remains open, even if the influence of traditions seems to hinder change.

4

Audience and Diffusion

The audience for opera has always been, and remains, central to the future of both opera as an art form and of the houses that produce the performances. Opera attendance has been relatively stable over the past decade. Some dips occurred during the recession of the past 2 years, but audiences have recently increased thanks to the promising deployment of multimedia in the operatic world. Within the confines of opera houses, audiences traditionally have been maintained through active commercial communication and marketing policies. Today, information technology and social media magnify the impact of such programmes beyond the world of opera houses. A look at the retransmission of operas in movie theatres and on other digital networks may provide significant insights.

1. Opera's audience: relatively stable attendance

The audience is obviously key to the success of opera houses. The main question is the same everywhere: what is the overall trend in opera attendance? For many years data have been gathered by *Opera America* for North America and by the *Deutscher Bühnenverein* for Germany, and more recently by the *Réunion des Opéras de France*.

Larry Bomback's July 2009 *Opera America* study illuminates recent developments in North America. Sixty-three professional opera houses or companies, representing approximately 55 per cent of *Opera America* membership (excluding the New York Metropolitan Opera), have regularly provided this organization with figures.¹ Attendance dropped off sharply (6 per cent) during the main season from 2004 to 2005, then grew for three consecutive seasons back up to the 2004 level, until the onset of the recession brought a new drop of 4.5 per cent from 2007

to 2008. This works out to a total drop of 5.45 per cent from 2004 to 2008. The New York Metropolitan Opera's attendance figures hold particular interest, as this house represents between 20 per cent and 25 per cent of total US opera house attendance. Between 2004 and 2008, attendance rose by 8 per cent, climbing from the low levels that followed the events of 2001, with an improved trend during the 2006–07 season. Peter Gelb, the Metropolitan Opera's new general manager in 2006, immediately invited new directors, some of them from the movie industry, to reinvigorate productions.

In Germany, the audience has shrunk slightly since 2005, but individual opera houses show slightly different trends over the period, making it difficult to draw an overall picture. Theatre Erfurt's opera audience grew from 85,900 to 111,337 spectators, an increase of 30 per cent that may be a consequence of opening a newly built theatre. The Frankfurt am Main Staatsoper enlarged its audience by 11 per cent, to 199,400 spectators. Semperoper in Dresden dropped 13 per cent, from 244,788 spectators to 211,086, during the same period, and Munich Staatsoper by 3.8 per cent, from 368,088 to 354,470. Stuttgart and Hamburg Staatsoper are practically stable, with audiences of 180,000 and 230,000, respectively.

In France, the opera audience remained stable from 2006 to 2007, with a total figure of 1,150,000 spectators, 31 per cent of whom attended the Opéra National de Paris performances. The 2008 figures are virtually the same.

Looking ahead, some American houses may offer fewer performances in 2010–11, due to the economic difficulties they face.

The renewal and rejuvenation of the public is a second concern for opera houses on both sides of the Atlantic. The average age of the opera-going public is around 60 years or more. Is this demographic getting older or younger? Overall surveys concerned with this aspect of audience renewal and trends are lacking. A 2008 study of the audience of the Opéra National de Paris concludes that the opera goer's average age dropped from 52 to 46 during the past 5 years. In Lyon, 52 per cent of the house's overall audience is under 45, and 25 per cent is 25 or younger. In the Grand Théâtre de Genève, the average age has moved from 63 in 2001 to 55 in 2009.

Collective efforts are being made by professional associations to promote opera to wider and younger audiences. In 2007, *Opera Europa* launched the "Opera Days" initiative. Most European opera houses now open their doors once a year to the public and display artistic activities, artists, technicians, sets, costumes and accessories that contribute

to their productions. Some houses open dress rehearsals to the public for free; others organize performances, concerts and recitals on this occasion. Promoted by information campaigns and media efforts and supported by the European Union, the Opera Days programme has so far (2007, 2008 and 2009) reached out to more than a hundred thousand people in more than 100 houses all over Europe. Similar initiatives exist in North America, where *Opera America* also supports opera days, organized by a number of American opera houses and companies.

The allure of opera houses depends on a limited number of factors.

Nicholas Payne reminds that “during much of the 19th and first part of the 20th century, composers expected their operas to be presented in the audience’s own language, as with a play. The growing practice of performance in the original language was given an enormous boost by the introduction of surtitles, first at the Canadian Opera Company in Toronto, but rapidly spreading worldwide. These titles are the electronic equivalent of the printed libretto made available in the lighted auditoria of the 18th and early 19th century. They are credited with instilling a more concentrated attention in our now darkened auditoria and as a highly effective educative tool. At the same time, they have contributed to the loss of direct communication between singer and audience in a shared language, which used to underpin the operatic experience and which may still be found at the few remaining companies which use the vernacular”.² Classic titles are the most attractive, especially if internationally renowned artists are invited to sing. Houses that define themselves as “international” build part of their reputation on the practice of casting the best-known singers and artists in the world, but not all opera houses can afford such invitations. A number of European houses are also enhanced by the presence of world-famous in-house or invited ballet companies, and in Europe by concerts given by their own orchestras. Some opera houses or festivals have built their attractive power on distinctive artistic features. The Glyndebourne festival does not owe its image and appeal to divas but draws an audience with its care in building musical and dramatic coherence, and by making appropriate choices when it comes to artists, singers or conductors with a promising future. The festival’s ideal location, not too far from London and the lovely scenery of the southern hills of England, certainly add to the house’s ability to seduce the audience.

The Nederlandse Opera in Amsterdam has built its fame on original programming choices, the search for a fine balance between music and theatre, and bold but calculated gambits in terms of stage work. With both a consciousness of its heritage and a desire for innovation in its dramaturgy, aesthetics, theatrical technique, stage engineering and set

design, it has shown an obvious willingness to open its doors to a wider and younger public. Other houses attract visitors through their historical image and the monumental prestige of the houses themselves, which recalls their past as renowned palaces. New buildings, on the other hand, owe their success to the top-notch architecture they offer, alongside comfort, state-of-the-art theatres, friendly foyers and halls large enough to host parties and other private events organized by their visitors. Many theatres have been or rebuilt between 1984 and 2009, in Cardiff, Glyndebourne (1997), Essen (1984), Erfurt (2003), Copenhagen (2005), Oslo (2008), Valencia (2005), and Paris (Bastille 1989), as in Barcelona (Liceu 1994), London (Covent Garden 1998), Milano (La Scala 2003) and Dallas (2009) are good examples of this.

In the USA, a permanent relationship with spectators and donors is part of opera houses' and companies' culture and fundamentals. Many European opera houses strive to renew or strengthen their relationship with their public and pay ever more attention to their surrounding community. Some of them have done so for years. The Stuttgart Staatsoper, which is part of Germany's Württemberg Staatstheater, is a good example of a creative space fully open to the public. In France, the Opéra de Lyon uses a wide spectrum of musical initiatives to reinforce its public appeal and build its audience among the surrounding communities.

This survey would remain incomplete without mentioning the fact that new opera compositions – and they are numerous – generally face difficulties in gaining public acclaim on reasonably short time horizons. No recent composer seems able to bring in audiences in the way that past composers did, even when they were still alive. Monteverdi, Rameau, Gluck, Handel, Mozart, Beethoven, Rossini, Bellini, Donizetti, Wagner, R. Strauss, Verdi and Puccini still dominate today's programming, often to the point of overshadowing our contemporaries.

Berg, Schoenberg, Janacek, K. Weil, Shostakovich, Gershwin, Bernstein, Poulenc, Tippett or Britten do succeed more and more, but with rather uneven results. John Adams and John Cage are well received in North America, while in Europe, opera houses offer opportunities to diverse and current composers such as Thomas Adès, Peter Eötvös, Philippe Boesmans, Pascal Dusapin, Philippe Fénélon and others. To what extent their new operas will succeed in drawing an audience in the future, no one can say, but these composers constitute vital and necessary artistic risks for those opera houses backing them. Still, the attraction of opera houses owes more to past composers than to today's.

The audience within an opera house can be considered from both quantitative and qualitative viewpoints. The measure of attendance belongs to the quantitative realm of figures and comparisons. The

qualitative aspect is equally important. Such an approach is central to “the performing arts”, as they are called in Anglo-Saxon countries, or “*le spectacle vivant*” in France. The action on stage and the physically present audience in the auditorium feed off each other during performances. There is a special blend of emotions for musicians or singers performing in front of an audience, which makes it completely different from studio, cinema or television work. Spectators in an auditorium do not experience the performance the same way as in a movie theatre or in front of a television screen. A quantitative view of attendance brings us back to box office issues related to the number of spectators and the revenue they generate. The qualitative approach underlines the uniqueness of living performances. Without physical attendance, opera houses would lose their *raison d’être*.

2. Enlarging the audience and box office maximization: two conflicting challenges

Ticket sales are the barometer of public interest, always says Nicolas Payne. When it comes to identify people attending the opera houses’ performances, two contradictory challenges appear. One is to provide a greater and easier access to audiences of all ages and backgrounds not depending on their capacity to buy expensive tickets. The other is to maximize the box office revenues. Both are important everywhere and are being handled differently. Measuring the ticket prices levels and ranges is not a simple exercise when it comes to comparing opera houses’ policies and practices. Looking at highest and lowest prices is easy but not sufficient. The average ticket price is a better approach. We view it – as *Opera Europa* does – as the total opera performance box office turnover divided by the number of tickets sold. It covers all pricing situations. Yet, for a given house, it has to be considered parallel to its occupancy capacity.

Enlarging the audiences with social and cultural objectives

Traditions in most European opera houses have favoured large openings at rather low ticket prices. Similar attitudes exist in wealthy American opera houses, although based on financing methods different from those in Europe. A good way to measure the effectiveness of policies aiming to enlarge the audience is to consider average ticket prices, on the one hand, and, as far as possible, the number of low-price tickets sold by opera houses.

A look at Table 4.1 illuminates the issue. The average ticket price is more than nine times higher in Milan’s La Scala than in Theater

Table 4.1 Box office share in operational budgets and ticket prices

Season 2007–08	Metropolitan New York	Los Angeles Opera	Liceu Barcelona	Nederlandse Opera Amsterdam	Scala Milan	Gartner Platz Munich	Opera de Lyon	Theater Erfurt
Box office revenue (% of budget)	38	35	32.87	23.44	21	13.9	8.3	12.61
Average ticket price	NA	NA	€68	€ 62	€109	€35,85	€47	€14
Higher/lower ticket price (€)	250/80	205	127/7	110/10	170/10	58/4	95	22/4
Opera audience (x 1,000)	826	207	202	211	171	151	44	37.5
Diversified artistic activities	no	no	yes	no	yes	yes	yes	yes

Erfurt. We conservatively estimate that in 2007–08 the average ticket price was around \$130 at the New York Metropolitan Opera and \$95 at the Los Angeles Opera. Another way to measure the openness of opera houses is to determine how many low-price tickets they offer for each performance compared with the total number of tickets. German opera houses as a whole have a long tradition of low ticket prices, although more so in the past than today. The link between this tradition and levels of public funding, which often makes up more than 80 per cent of the Musiktheater budgets, is an explanation to the low prices. In many German and Austrian Musiktheater, maintaining the tradition of publicly accessible culture is considered as important as their finances. The Vienna Staatsoper can receive 2,276 spectators, with 1,709 seats and 567 standing positions, the well-known *stehplätze*. During 2010–11, the cost of tickets for these *stehplätze* will be €4 or €3 given their localization in the auditorium. All German and Austrian houses offer similar possibilities. The tickets are available a few hours before the shows. Sometimes, as at the Vienna Staatsoper, depending on who is singing that evening, you may have to stand in line some hours before the tickets go on sale! To various degrees, opera houses in the Scandinavian countries, France, Italy, the UK and most of the regions of the Benelux nations follow comparable policies that are defined, recognized or financed by public organizations. In Germany, the Volksbühne and the Theatergemeinde are associations open to people interested in art, music and opera that benefit from special rates for their members. Created about a century ago, they remain powerful in spite of their mysteriously declining membership. According to the *Deutscher Bühnenverein*, Munich's Theatergemeinde boasted 40,000 members at the beginning of 2000. The Kulturgemeinschaft in Stuttgart, an organization with similar objectives, had 38,500 members then. In Hamburg, Freiburg and Frankfurt, the owner of a theatre card, which varies in price from €50 to €100, can save up to 50 per cent for single tickets at theatres, opera houses and local halls. Tickets at such reduced rates are sold partly to groups, local communities and young people and can represent up to 30 per cent of tickets sold at German opera houses. Similar practices exist almost everywhere in Europe. We shall have a further look at them when analysing pricing diversifications in most opera houses. At the Opéra National de Paris, in 2006–07, subscriptions purchased by communities that were subsidized by price reductions represented 12.3 per cent of the opera's box office income. Similar policies also exist in American houses, although with no support from public financing or government

mandates. Sometimes donations underwrite certain costs. Tickets may be bought at the highest price by a charitable organization, and then sold at reduced rates to the slice of the public the charity intends to benefit.

Maximization of the box office revenue

Most of the largest American and European opera house halls charge the highest average price they can while still filling most of their seats, as illustrated in Table 4.1. They also diversify their price points, aiming at increasing season ticket sales. The richer the city, the more the maximizing of box office revenue can be observed, while simultaneously production costs increase, as shown on Table 4.1. This trend is independent of opera houses' home countries. It is linked to their urban markets and the size of auditoriums. In such houses, box office revenue accounts for a large and increasing share of total income. The box office is crucial to many American houses and certain European houses located in national and regional capitals. For American houses, box office success is a question of survival and the maximization of their commercial resources an inescapable priority. Their pricing policies respond to this reality. These policies, however, bump up against their limits in the capacity of the public to pay for seats at the prices offered, something that varies considerably from city to city within the same country, in the USA as in Europe. It would be unrealistic to ask New York prices in Kansas City. In Germany, the average spending capacity for tickets at high prices is greater in Munich than in Berlin; in Italy, it is greater in Milan than in Parma; in France, it is greater in Paris than in Strasbourg; in the USA, it is greater in New York and Los Angeles than in Houston or Pittsburgh. Box office revenues represent 10–15 per cent of the operational budgets of most European houses, versus 38 per cent on average for their American counterparts, and 20–40 per cent for the houses in the largest national and regional capitals of Europe. The opera houses of great European cities are closer to their American counterparts in their ticket pricing and maximization of box office sales. Fortunately, the auditoriums in these cities have a reasonably large seating capacity, one far higher than the average for European opera houses.

Highly diversified pricing whatever the average price of seats

At the Staatsoper Unter den Linden in Berlin, in autumn 2009, the highest ticket price was €66 for a performance of *Salome*, *The Barber*

of *Seville* and *Der Rosenkavalier*; €84 for *Lohengrin*; but €220 for *Simon Boccanegra* with Plácido Domingo singing the title role. The diversity of ticket prices is based on many criteria. Houses often adopt the yield management techniques that were introduced some years ago by airlines to fill their seats and maximize their revenue. Diversification of ticket prices is widespread. Prices have always depended on the location of the seats, fame of the house, operas and artists, and sometimes on whether the performance is a premiere or not. For the 2007–08 season, from the New York Metropolitan Opera to the Theater Erfurt, the highest ticket prices vary between €180 and €22, an extremely wide range. The more weight placed on the box office in carrying the operating expenses of the house, the higher the ticket price. At the Bayerischer Staatsoper in Munich, seven different categories of price lists exist given the relative importance of titles, seven at the Opéra National de Paris, five at the Vienna Staatsoper and three at the Liceu. As far as pricing is concerned, auditoriums are divided into ten sections at the Vienna Staatsoper, eight at the Liceu and seven at the Opéra National de Paris. During the 2009–10 season, higher prices vary from €243 (Bayerische Staatsoper Munich) to €254 (Staatsoper Wien) to €180 (Opéra National de Paris). These prices have to be considered cautiously though because they apply only to certain titles. Most European houses come close to the German model, where each evening a large number of seats are kept affordable at a price of €10 and, as described in the case of the Vienna Staatsoper, even much less.

Tickets are often cheaper for performances of newly composed operas or works that are considered difficult. The Opéra National de Paris instituted a cheaper pricing policy in this respect between 1995 and 2004. Other houses, such as the Lyric in Chicago, do not make such a distinction between titles. Some suggest establishing different price lists according to the casting. The Liceu, for instance, offers two casts for each title, with different price charts. Rates can also vary according to the day of the week. The Lyric, the Opera of Stockholm and Glyndebourne offer cheaper seats on weekdays than during the weekend. American houses also set a wide range of ticket prices. However, the average ticket price remains twice as high as that of German houses.

The already mentioned *Opera America* 2009 survey concludes that the main season box office revenue rose 11 per cent over the five-year period from 2004 through 2008. The study suggests that this rise is partly due to the price increase of the most expensive tickets, while the lowest prices remained constant. Interestingly enough, the attendance of the 63 houses studied by *Opera America* decreased by 4.5 per cent, while their box office revenue climbed by 11 per cent.

Subscriptions: a sought-after commercial safety

Subscription series and subscription renewals are good indicators of the commercial health of opera houses and help sustain ticket pricing policies. In the USA, correlations seem to exist among seating capacity, the proportion of operating expenses carried by box office revenues, the share held with subscriptions and the average price per group.

American opera houses are grouped according to their size, starting with the largest. The New York Metropolitan Opera is considered separately because of its dominant position. Table 4.2 shows that the higher the seat capacity, the heavier the importance given to box office revenues, and the greater the sales of subscriptions.

A *Deutscher Bühnenverein* survey on the global audience for opera, theatre, concerts and ballet in Germany concludes that subscribers made up 40 per cent of the attendance in 1992–93 and less than 35 per cent in 2005–06.

Subscription sales secure box office revenues season after season. Collected months before the performances, subscription revenues provide very welcome cash revenue. The Liceu sells 79 per cent of its seats for opera performances through subscriptions. The Opéra National de Paris sells 44 per cent of its seats this way (which represents 40 per cent of its box office revenue from opera performances). Similar practices and results are frequent. Chicago's Lyric, Milan's La Scala and the Opéra National de Paris do not impose any limit on the number of tickets they offer for subscriptions. Those sales are often coupled with price discounts ranging from 5 per cent to 10 per cent. Subscriptions also provide privileges and significant benefits (exchange possibilities, advance notice, priority seating and so on) justified by advance purchases or group tickets.

Depending on the offered packages, subscriptions may support the house's freedom in choice of repertoire. When trust prevails on the part of the spectators, packages may more easily suggest a combination of well-known and lesser-known works. The Opera Theatre of Saint Louis is familiar with formulas of season programmes with, for instance, three classics and one less-known title. The diversity of subscription formulas tends to increase everywhere, especially in the larger opera houses.

Young audience-building initiatives from tailor-made programmes to tailor-made ticket prices

Young audience-building initiatives often translate into a series of customized performances and attractive commercial formulas for basic opera performances. At the Munich Staatsoper in 2007–08, 6,795 young

Table 4.2 Box office revenue, ticket price and subscriptions in American opera houses

Season 2006–07	Total US opera houses and companies (97)	Metropolitan New York	Level 1 opera houses (13)	Level 2 opera houses (25)	Level 3 opera houses (21)	Level 4 opera houses (37)
Number of seats	47,356	881,532	145,326	43,611	14,922	5,922
Average highest ticket price (\$)	99	250	167.7	116.3	81.3	61.6
Share of subscriptions in total revenue (%)	29	32	44	41	30	12
Share of box office revenue in total income (%)	35	38	36	31	27	25

Source: *Opera America*, season 2006–07.

people attended special programmes designed for them. In addition, 24,836 scholar and student tickets were sold for regular performances, out of a total of 534,950 tickets. This equals 5.9 per cent of the audience. At the Nürnberg Staatsoper, during the same season, the equivalent numbers were 3,438 for the special programmes and 10,439 for the regular performances, out of a total audience of 150,642 opera spectators, or 9.2 per cent of them.³ At the Lyric, a student e-mail file was set up and contained about a thousand names at the end of 2008. The initiative allows the opera house to announce by e-mail, with often very short deadlines, the availability of seats at preferential rates to the registered students. At Covent Garden, in 2007–08, the 22,000 students registered on an e-mail list were informed about openings for their benefit only. Tickets were priced at £10. Their number varied from one performance to another. In London as in Chicago, this is first come, first served. Two channels of privileged access were created by the New York Metropolitan Opera in 2008: one for students and young people under 25, and another for seniors. During the 2008–09 season, 150 orchestra seats were made accessible to students for most performances at a price of \$20. An equivalent mechanism was put in place for seniors to obtain reserved seats at the same price, in their case, booking seats by telephone on the day of the performance. At the Liceu, people under 26 can obtain a 50 per cent discount on a maximum of two tickets bought on the day of the performance, two hours before the curtain goes up. The discount is 30 per cent for people age 65 or more. A similar policy prevails at the Opéra de Lyon, where the purchase of a €15 loyalty card gives access to a 10 per cent reduction on all individual tickets. Twenty-six year-olds or younger opera-goers benefit from a 50 per cent discount on seats, including in the best categories. These policies and practices are coupled, in Europe as in the USA, with last-minute adjustments that take into account the occupation rate of halls.

These universal efforts to entice young people stem from the need to renew the audience for opera. The approaches and strategies adopted, of course, vary from one house to another. Many base their appeal on shows specially created for children, and usually do so at very attractive prices for shows scheduled in their halls. Everywhere, activities specially created for children come with a lower ticket price, no matter the cost of production.

A survey of the policies and initiatives proposed to attract young audiences reveals a wide variety of activities and operatic programmes, a clear sign of opera houses' growing interest in attracting young audiences around the world. Table 4.3 provides a summary of these policies.

Table 4.3 Artistic activities and formulas proposed to children

Short and simple shows specially designed for children	Shows with singing and dance in which children take part	Operas specially composed for children	Operas made simple and shorter for children (the small <i>Magic Flute</i>)	Special ticket prices and subscriptions for people under 26/21 attending regular performances
A few singers and often a piano. Such shows often go from school to school	Strong involvement of opera houses organizing such shows	Often outsourced to small professional companies	Often outsourced to professional small companies	Large diversity of formulas
As organized by the Houston Grand Opera	In the smaller halls or auditoriums	In the smaller halls or auditoriums (Opéra National de Paris, Liceu, Lyon Opera, DNO Amsterdam, Erfurt, Dresden)	Common in Europe	Common everywhere

The focus on young audiences sometimes manifests itself as ambitious projects linking them to their community's heritage and cultures as well as to popular and folk song traditions. These programmes encourage personal involvement and artistic participation in the projects with the help of professional artists, and also promote the opera houses' own social role in their cities.

In Amsterdam, the "Marco Polo" project of the Nederlandse Opera in 2008 aimed at catching the interest of the city's school population by playing on the variety of its ethnic background, and by mobilizing popular choir classes in the city. They sang in streets, schools and numerous public places in Amsterdam. The project gathered 3,000 children, students and volunteers for a public concert on the square in front of the opera house.

In 2007, the Houston Grand Opera produced an opera based on the so-called "Songs of Houston", a collection of narratives from

communities of Latin American immigrants. The librettist Leah Fax and composer Christopher Theofanidis transformed this into an opera called *The Refuge*. The work premiered at the Houston Grand Opera, and a recording of the performance was released on CD.

The Opéra National de Paris continues its 15-year-old annual programme called “Ten months of school and opera”. Every year it welcomes 500 children from schools located in underprivileged areas. The children participate in a range of educational activities organized with the help of the opera house’s various technical services and are exposed to this working environment. The programme has shown positive results. It has acquired a reputation for improving the performance of children who have difficulty in school, as well as introducing them to the world of opera productions and performances.

A recent study by the European network for opera and dance education “RESEO” on the activities of European opera houses focused on children concludes they are achieving their aim to develop their personalities and their taste for opera.⁴

Communication strategies and marketing

Active communication and marketing strategies fulfil various objectives and follow many paths, some of them traditional, others of more recent vintage. These include appealing print and online collateral, from brochures to websites, describing programmes and the artistic activities of the house; the organization of gala events, sometimes linked to performances and to singers, and often coupled with fund raising; and the attraction of new spectators through special events and offers.

Brochures and information campaigns

Marketing campaigns use a wide array of print and electronic media: posters, advertising inserts in large-circulation newspapers and in niche magazines, season brochures, individual programmes for the shows and, of course, the opera house’s own website. Most opera houses favour descriptions of the programmed operas, some emphasizing their variety, others their artistic merit. They enthusiastically trumpet the artists chosen to interpret the works.

This is decisive when it comes to maximizing box office revenues. The Lyric in Chicago uses targeted and personalized communication to promote the sale of operas considered more difficult than the evergreen standards. The director of communications, Suzan Mathieson Mayer, tries to motivate select individuals to attend these performances by

sending them material that tells the story of those more difficult operas in an intriguing way.

The 2008–09 season poster of the Houston Grand Opera shows three horizontal banners delivering three messages: the first one depicts faces and names of the renowned singers who will perform during that season; the second, the titles of the operas to be performed; and the third, the price lists for the performances. The inserts seen in daily newspapers in New York, presenting Peter Gelb's first 2006 season at the New York Metropolitan Opera, prefigured its ambitious multimedia strategy by announcing the titles of the works and the names of the film directors chosen for each of them, and then in smaller type, the names of the composers and performers. The 2009–10 season brochure of the Semperoper in Dresden takes the form of a substantial work containing illustrated information about its 43 opera performances and 50 biographies of the artists engaged for opening nights. At the time of Gérard Mortier (2004–09), the Opéra National de Paris brochure illustrations and photos adopted a large degree of abstraction, reflecting the clear intention to move away from traditional staging. In Europe, the printed programmes for individual shows are rich in text and illustrations and are sold to the public. Programmes are shorter in American houses and often offered to the audience free. They also contain such important information as acknowledgements of donors and the scale of their contributions. In recent programmes of the New York Metropolitan Opera, Peter Gelb enhances the productions of the house by explaining how they were set up and emphasizing the search for a balance among the contributions of everyone involved, artists, film directors, technicians and so on.

Gala events

On the season's opening and closing nights, American houses frequently organize festive events. On other occasions, the programmes vary: recitals to honour the artists, excerpts from the shown operas to celebrate anniversaries, special evenings linked to fund-raising issues such as the Lyric's annual wine auction gala. The amount of money requested to attend such evenings can reach several hundred, even several thousand, dollars. The celebration of the 125th anniversary of the New York Metropolitan Opera (15 March 2009) was accompanied by a fund-raising campaign that brought in \$125 million! Present on the stage: James Morris, Angela Georghiu, Roberto Alagna, Plácido Domingo, Maria Guleghina, René Pape, Waltraut Meier, Juan

Diego Flores, Suzanne Mentzer, Thomas Hampson, Ben Heppner, Dmitri Hvorostovsky, Deborah Voigt, Joseph Calleja, Natalie Dessay and Renée Fleming, singing altogether extracts from 21 different operas, all of them conducted by James Levine.

Other countries, other traditions. At La Scala in Milan, the highest price for a seat for the traditional opening night of 7 December reached €1,000 in 2009. In Paris, the opera's private contributors of AROP (friends of the Opéra National de Paris association) purchase their subscriptions at twice the normal price.

Building the audience through special offers

Usually, a dress rehearsal – the last working session before opening night – is mainly reserved for the production team, the artists, former artists of the house, the present and former staff of the house. Access is then free.

But sometimes things are different. At Covent Garden, the house website indicates that one can purchase, under certain conditions, tickets for the dress rehearsals. In September 2009, at the New York Metropolitan Opera, several hundred seats were released for free to the public for the dress rehearsal of *Tosca*. Highly effective marketing techniques that were unfeasible or unimagined only a decade ago are flourishing. In 2009, for instance, Covent Garden offered seats for one of its performances for less than £20 to the readers of a major UK tabloid.

Marketing and sales techniques increasingly depend on information technology

Marketing now relies extensively on the Internet. When logging on to the website Operabase, which links to opera house websites all over the world, one can immediately see in which languages they are accessible by the array of small national flags. For the last 15 years, opera houses have been creating, developing and updating successful, attractive and revealing websites that tell us a lot about their strategies, as their season brochures do. Certain houses, such as the Metropolitan and the Lyric, include on their sites detailed archives of their programming and cast that stretch back to their origins. Others will undoubtedly follow this practice.

Sales channels have diversified considerably over the last 15 years. Three were and still are general: mail orders, ticket offices and telephone sales, which are rising within more and more houses. Sometimes, independent agencies obtain the right to sell tickets. Compared with the

recent past, ticket sales efficiency has tremendously increased. Fifteen years ago, the Opéra National de Paris still managed special groups of tickets for the different sales channels manually. The slowness of manual reshuffling could result in sales losses when one group was depleted if one could not benefit from possible surpluses of unsold tickets from the others. Today, physical ticket sales from the house box office are on the decline in favour of mail orders, telephone sales and increasingly Internet sales. The development of online ticket sales boosts the box office sales potential. At Covent Garden, online tickets represented 37 per cent of the total turnover of the box office in 2007–08.

Box office software constantly evolves towards greater speed and increased reliability. It now offers real-time management of diversified sales channels: subscription sales, phone sales, ticket office sales, mail order, sales through agencies, all of it concentrated on computerized tools. Opera houses can then rely on data in two fields linked with each other: information on individual spectators and ticket sales. These software tools remain expensive, however, so their economic rationale depends on the number of tickets sold per year. Five hundred thousand tickets or more fully justifies such an investment, especially if a house boasts a great diversity of artistic activities and many types of tickets. Some opera houses have built databases that profile buyers based on their previous purchases and allow the houses to quickly extract practical information. The ability to target specific performances to certain spectators allow for personalized information and sometimes promotions, in particular for the less popular titles. In the larger American opera houses, marketing files may also allow for the identification of those spectators who buy subscriptions and could become donors. The same files may inform the houses about the donations made. The Tessitura file at the New York Metropolitan Opera contains 1,500,000 names, of which 300,000–400,000 are considered active. The file of the Opéra National de Paris contains 500,000 names.

The printed ticket may be extinct in a few years. The New York Metropolitan Opera has already raised the possibility of abandoning the physical ticket in favour of text-based tickets for cell phones. As in all service industries, information technology will maintain a fast pace of change.

3. Audience of opera houses in times of live performance transmissions shown in movie theatres

The relationship between opera and multimedia is an old one, but completely renewed today by developments in information technology.

After the First World War, 78 rpm records appeared, then in the 1950s vinyl LPs, then CDs and DVDs. The uses of multimedia are myriad: live or recorded radio broadcasts of both new and historical performances; live transmission outdoors on giant screens; live streaming of performances from the houses' website; special televised productions or live high-definition (HD) performances shown on public television; classic telecasts and archival broadcast recordings for high-quality viewing and listening on personal computer or released on video. All media distribution channels and state-of-the-art digital transmission tools are constantly evolving, and some of them are proving very popular around the world. All of these initiatives contribute to bringing opera into the audience's home-space. The live HD transmissions of opera performances shown in movie theatres or on television networks worldwide since 2006 are probably a breakthrough. The Metropolitan, and to a lesser extent Covent Garden, Glyndebourne, the Liceu and others regularly show live or recent performances of some of their productions, transmitted in HD to an increasing number of movie theatres across North and South America, Europe, Australia and Japan. These houses thus make their productions more accessible to wider audiences and provide a new model for outreach initiatives.

Let us concentrate on live HD opening-night transmissions to movie theatres by the New York Metropolitan Opera since 2006. Because of its rapid success in many countries around the world, it is a breakthrough in opera performance diffusion.

The success of performance transmissions shown live in HD in movie theatres

Figures talk. At the Metropolitan Opera, Peter Gelb launched a dynamic policy of live broadcasts of opening-night performances, to be shown in HD in movie theatres both in the USA and abroad. During the first transmission season, 325,000 spectators watched the live broadcasts of several opening-night Metropolitan performances. During the 2008–09 season, 24 premiere performances and a gala were broadcast. The numbers work out to 1,800,000 spectators worldwide, more than twice the 856,000 spectators who came to the Metropolitan that same season. In 2009–10, 900 movie theatres in 42 countries have shown nine live Metropolitan premieres. Five hundred of those 900 movie theatres are American. In the summer of 2009, the Metropolitan also broadcast in US cinemas two other operas produced in 2006, *Il barbiere di Siviglia* and *Zauberflaute*. In addition, it offered six free broadcasts from its previous season, shown on a big screen set up on the plaza of Lincoln Center, where 6,000 chairs were available. This means that altogether 36,000

spectators were able to attend these six open air cinema performances. For its US cinema operations, the Metropolitan signed an agreement with Fathom, a division of National CineMedia (NCM), leading operator of the largest digital theatre network in North America. The project is sponsored by Bloomberg and also benefits from a donation by the Neubauer Family Foundation. Let us focus unabashedly on financial figures, and let us assume that 1,800,000 spectators have to pay an average of \$20 for a cinema ticket in the USA and the rest of the world. The total return generated all over the world would reach \$36 million, and if that were equally divided between the two partners, the Metropolitan's share would be \$18 million. In February 2009, Daniel A. Wakin, a journalist at the *New York Times*, estimated the profit for the Metropolitan at \$1 million.⁵ Before trying to assess the key factors underlying this strategy's success, let us look at some of the reactions it provokes.

Opera houses' visions and policies vis-à-vis live opera HD transmissions in movie theatres

Conflicting viewpoints of opera house managers

For Peter Gelb, opera is an ageing art form. He views the broadcasting of high-quality audiovisual productions as a tool to counter its possible decline. Whether or not live HD performances explain part of the Metropolitan's success in filling more seats is less important than the communication and outreach it provides across the world. The general managers of those few opera houses that regularly broadcast some of their productions on big outdoor screens and in HD movie theatres think that it will improve both the occupancy rates of their halls and their institutional reputation, while demonstrating their will to popularize the art form. These three objectives are interconnected. Since 2006, the occupancy rate of the Metropolitan has apparently risen by 16 per cent, after having heavily suffered from the 9/11 events in 2001. The Metropolitan's board members were at first wary of or even hostile to Peter Gelb's idea of broadcasting premieres in New York City's cinemas. Trust finally won over mistrust. The project was accepted and successfully launched, without, it seems, jeopardizing the Metropolitan's occupancy rate.

The occupancy rates of Covent Garden, Glyndebourne and La Scala, all of which are above 90 per cent, could gain from live broadcasts, but this rationale alone would not be sufficient to justify the implementation of such ambitious projects. Other considerations, namely fame and the house's institutional image, weigh more than growing numbers,

mainly because reputation is central to the quality of the relationship between the house and its constituents. Success is based on an amalgam: image.

In 2007–08, the annual report of the Royal Opera House's Chairman of the Board of Trustees mentions successful audience-growing initiatives of the house, including the BP Summer Big Screen performances. "Excellence," says the report, "does not come easily, and it should be a source of pride for our nation that this institution is among the very best in the world." Making the most of information technology is part of excellence.

The success of the Metropolitan initiative leaves no one indifferent. Some are resolutely hostile. Gérard Mortier, now artistic manager of the Teatro Real in Madrid, stands among the clear opponents to the very idea of broadcasts. "May the opera lovers go to the opera, and not to movie theaters!" he said in the spring of 2009, at an annual meeting of *Opera Europa* in Barcelona. Besides deploring the inexorable rise of digital media, which tends to lock each one of us inside a more and more virtual world, Professor Gerd Uecker, the Dresden Semperoper Intendant, believes that nothing can replace the physical link between the public and the singers in the same concert hall during an opera performance. In 2008, William Mason, general manager of the Lyric Opera in Chicago, mentioned that his house did not possess the financial resources for a broadcasting strategy comparable to that of the Metropolitan. Nicolas Joel, director of the Paris National Opera, thinks that nothing can replace live contact with artists. Nevertheless, he made possible a successful live HD transmission of the *Ballets Russes* to 60 French cinemas in December 2010. These last 18 months other similar one shot initiatives took place in Europe, which means that some opera house managers are considering the issue. Though, for most leaders in the opera world, the motivation that drives their artistic activities lies in direct contact with their public. They exult in live performances. Multimedia may be embraced if they facilitate this relationship, but not if they replace it. The same individuals also wonder or worry about the economic viability of such a strategy and its overall difficulties. The adventure is only just beginning.

What about the public now and tomorrow?

Detailed studies are still to come, but the public does attend the opera premieres shown in movie theatres throughout the world. Commercial results are undeniable. To the cinema spectators, this may be the chance

of a lifetime to see a live opera performance from some of the most prestigious opera houses in the world, and to see it at an affordable price. They have often dreamed of seeing or of seeing again a *Bohème*, a *Carmen*, a *Zauberflöte*, a *Traviata*, with the greatest singers seen up close, closer than they could be seen from the best and most expensive seat of the most esteemed and splendid opera house of New York or London, and all that with unprecedented sound quality. Live HD broadcasts in movie theatres build the future, while the limited capacity of halls and auditoriums dramatically slows the theoretical rate at which one can expand the audience, except through increasing the number of performances. These broadcasts can reach a geographically remote public who can thereby hear, see and admire up close the performances of Karita Mattila, Anna Netrebko, Angela Georghiu, Joyce Di Donato and so many others. The next question: how long will it last? Will Janacek's and Britten's operas be as popular in the cinemas as Verdi's, Puccini's or Mozart's?

Could opera cinema weaken opera house attendance? If cinema spectators of the Metropolitan in Belfort and Montbéliard in France grow accustomed to watching the broadcasts that come to them from across the Atlantic, will they stop going to Mulhouse, Nancy or Paris to attend a live opera performance? The Metropolitan offers an answer by advising other opera houses to lean on its live broadcasts to strengthen their own marketing strategy. In October 2009, the Monte Carlo Opera, accepting this suggestion, broadcast *in situ* the opening night of *Tosca* in New York. Unforeseen developments and synergies are still possible. Many questions remain. Answers await the future.

What about the artist's viewpoints on the Metropolitan's diffusions?

Artists are ambivalent, torn between two points of view and sometimes choosing both. They admit that cinema diffusion and live staging are two different art forms. They share the opera house general managers' perspectives, up to a point. The emotional bond that springs from the relationship between singers, musicians and the public exists only because all of them share the common visual and auditory space of the stage/auditorium. This relationship will always remain unique, even if its quality partly depends on the size of the theatre. A broadcast performance offers much more detailed views of artists singing and playing, as if one were sitting right next to them. This is also unique. Suzan Graham, a live broadcast fan, explains their appeal: "Sometimes opera

comes close to spectator sport.... We go the extra mile with realism," but she adds: "There is nothing like the visceral power of live performance.... There is something that translates to a certain degree on the big screen, but not the way sound comes out of a pit with acoustic instruments and blows your hair back."⁶ The energy created by the physical contact between the artists and the public remains unmatched. Opera at the theatre and opera at the cinema are two different art forms.

Key success factors and strategic issues

Production policy is undoubtedly a key factor in success. We learn from the Metropolitan's success that technology offers huge new possibilities. The technical refinement and fidelity of the productions first come to mind. About 20 cameras, some automated, move around the borders of the stage, filming from many different perspectives. New optical instruments provide excellent results in low light. Immediate editing is possible and sound is recorded in HD, allowing for broadcasts of unprecedented quality. From the stage to the captured images, the production gains in accessibility in terms of details impossible to see from an auditorium seat. Both the Metropolitan and Covent Garden have chosen to go the self-sufficient route, controlling their production technology and not outsourcing their production. To become self-producers, both houses have acquired state-of-the-art technology, set up their own laboratories and control studios in-house, and trained or recruited experienced technicians, all without hesitating to ask famous stage directors or producers to pitch in. An independent production capacity is probably decisive.

Diffusion costs and policies are another significant issue. The commercial deals between opera houses and the movie theatre networks that broadcast the house's performances live obey a simple logic: both parties have to see an up side. Such is apparently the case at the Metropolitan. While the opera house talks about a minimal return per ticket sold, the partners, including National CineMedia (NCM), have to find in these broadcasts sufficient profitability, or at least to expect it. The technological upgrade of movie theatres enabling projection in HD permits them to offer the public a radically improved show. Opera houses benefit from new cinema technologies. Based on the Metropolitan experience, with a cost of \$20 a ticket in US cinemas and €20 or more in European ones, ticket sales seem to enable both movie theatres and opera houses to earn a good enough margin to be shared between them and to motivate them to keep these broadcasts growing both in the USA and abroad.

Should this sort of sharing agreement appear either pointless to one of the two parties or plainly disadvantageous to the cinemas, then it would simply fall through unless it were subsidized or paid for by private contributions.

Covent Garden, a few years back, bought out *Opus Arte*, a media production and distribution company established in 1999 and based in the UK. Recordings and DVDs of the opera house's productions are released by the company. Covent Garden has since financially and structurally consolidated the tools and businesses contributing to the house's return in a unique organization called the "Royal Opera House Enterprises".

Artistic costs are a sensitive and perhaps decisive issue. How much, now and in the future, can be paid to the orchestras, the choirs, the stagehands and the artists so they agree to such broadcasts at an economically sustainable level? We can suppose that musicians, choristers and some other opera house staff members would receive a fixed amount of supplementary wages or fees against their agreement for the broadcast of a given number of performances. If the broadcasts generated a profit, then the artists would receive a supplementary share of revenue. This may be the framework of many existing agreements today. What those agreements might be in the future is difficult to predict. Many solutions can be envisioned. In some cases, opera houses, musicians, choristers and artists will smoothly negotiate agreements authorizing easy and efficient broadcasts, with supplementary fees if the production and broadcast operations leave some profit. In others, negotiations will be more difficult and possibly unattractive for the opera houses. In this situation, development policies will hardly be possible. One can recall that Rolf Lieberman, general manager of the Opéra National de Paris, once produced 20 films of live performances. These films have never appeared on television because the rights are prohibitively expensive.

Financing such broadcasts is an issue of its own. Can this be financially self-sustaining? As far as we know, no opera house has ever published either a business plan or analytical economic results for such activities. One type of business model could theoretically be a self-sustained one. Another would be an openly subsidized activity, either by public funds in Europe or by private grants and contributions in the USA. Intuitively, the second business model seems more probable.

Is multimedia an open field for further opera developments? We deliberately focused on cinema because opera has now used this outlet regularly for 4 years. By no means can we answer this question, but we can see the possibilities. We know that filming technology will continue to improve rapidly. Diffusion networks will also continue to grow

and differentiate through limitless Internet variations, cell phones and even more sophisticated gadgets. This means that in the future, cinemas will probably not be the only places to view opera performances. There will be room for a wide variety of strategic segments. At the same time, opera will maintain its unique position as a live performing art.

Two challenges

In 2010, opera house audience trends seem to be weaker in the USA than in Europe. If so, this difference reflects a tougher environment for funding in the USA versus the public subsidy system dominant in Europe. One consequence of these difficulties shows in the programming: a stronger position for the evergreens, though neither in the USA nor in Europe have opera houses abandoned all risky productions of new operas. Maintaining the audience levels in the auditorium to the extent possible is the first challenge.

During this same year, the confirmed success of the Metropolitan premieres broadcast in HD cinemas is a significant development. Wherever cinemas regularly broadcast live premieres, local newspapers mention these events! Communication and marketing win. Elsewhere, a tension exists between the speed of technological developments and the doubts in the opera world about multimedia strategies; the difficulties in assessing what can be asked of musicians, choristers and artists; the debates on multimedia aesthetics; and, last but not least, the question of how to finance such activities. The success of opera at the cinema is also a medium-term challenge for those who think about the future of the opera auditorium and the comfort such halls should offer in terms of both visibility and acoustics. On these two fronts, cinema is succeeding. Whatever the future holds for the success of cinema and other multimedia diffusion, the Metropolitan's achievement is also an invitation to think about the funding systems of opera houses.

5

Architecture: Constraints or Opportunities?

In Paris in January 1875, and in Bayreuth in August 1876, two opera houses opened that were different in every way. The Palais Garnier gave concrete form to an emperor's dream of glory and magnificence, although he was deposed before he could witness the culmination of his restoration of Paris. It is the crowning achievement of the "Italianate" conception of opera theatres. The auditorium is designed for the audience to see, be seen and meet up. The facades and areas for socializing are sumptuous. The opera glorifies the prince and gathers the elites as much as it contributes to the promotion of operatic art. The Bayreuth Festspielhaus marks a total break from this conception. It was built inexpensively on the outskirts of a small town north east of Nuremberg.¹ Wagner had refused the project he was proposed in Munich. Bayreuth was his final choice. He was refused financial assistance from several quarters, and began his own fund-raising campaign before going back to his former protector, Ludwig II of Bayern, who agreed to provide a modest budget for the project. Bayreuth opera house has no ostentatious luxury: with its brick exterior and wood interior, the building is rather "barnlike". But this "barn" has been designed to present Wagner's "total art" vision, with nothing to detract the audience's attention from the music, the singing and the drama.

The Palais Garnier served the emperor's ambitions, while the Festspielhaus was erected to enhance a new vision of opera art form.

These two examples, which remain emblematic, provide a perfect illustration of the relationships between architecture and opera, and no doubt all forms of art for which architecture supplies the setting.

This chapter examines these two archetypes of opera architecture in greater detail, and then broadens the analysis to a sample of approximately 20 opera houses, some very recently built.

The theatre building represents time in the long term: centuries, when it is not set on fire by the footlights and reconstructed to the original plans in order to preserve the memory of the past. The ambitions of opera house management, their artistic and production policies, and the audience expectations cover a short-term period spanning one or more decades. The theatre architecture, the relationships between the auditorium, the stage, the back stage area and the socialization areas express – possibly more eloquently than many speeches – the functions and missions the designers intended for the opera house. They present constraints that can be formidable obstacles when those missions change: the auditorium may be too small, there may be difficulties or obstacles to alternation of productions or insufficient stagecraft facilities; or they may present problems that need correcting: poor visibility from some seats or mediocre acoustics. Many examples of costly renovations, such as Covent Garden and La Scala, have sought to rectify these shortcomings or alleviate these constraints. The theatre architecture can also offer opportunities, when a harmonious combination of resources is deployed with a clear, ambitious strategy, for instance, at some recently designed opera houses.

As constraint or as opportunity, architecture and the resources it provides to serve strategies are effective factors of success or failure.

1. Palace or “barn”? Should opera house architecture be modest?

Should architecture be modest? That appears to be the message conveyed by the Bayreuth Festspielhaus. The profusive sumptuousness that reigns at the Palais Garnier appears to say the opposite. The theatre designed to magnify opera as an art stands in contrast to the theatre intended to emphasize the social success of its players and spectators. It should be remembered that from the time both theatres were inaugurated until the eve of the First World War, the technical facilities of each were superbly matched to the pattern of operation: almost daily performances 11 months of the year at the Palais Garnier in the two disciplines of opera and ballet, compared to a maximum six-week season for the Festspielhaus, and only in certain years until the festival became an annual event early in the 20th century. This reflects two views of the mission of an opera house, but they are not necessarily mutually exclusive (Mortier, 2009, pp. 23–35). How are these fundamental choices reflected in recent opera theatres?

Bayreuth, a Wagnerian temple

The Festpielhaus was the brainchild of Richard Wagner, intended to stage his own operas. Paradoxically, Wagner had originally – very briefly – imagined a theatre to be used only once and then abandoned. But his satisfaction after the first few performances, the opinions of his wife Cosima and his children, the worldwide renown of his works and the support of the Länd of Bayern decided otherwise. The term “temple” is not inappropriate in view of certain past and present admirers’ cult of worship for the creator of *The Ring of the Nibelungen*.

Wagner was going through a bad patch at the time: relations with Ludwig II of Bayern had cooled, his financial position was deteriorating and he was expelled from München, where the building of a new theater for his operas had been planned. After considering Nuremberg, he finally settled on Bayreuth which had a magnificent opera house, the Markgräfliches Opernhaus, built in the mid 18th century to present the works of the period which today we would call baroque. Despite its large capacity and good acoustics, this theatre was totally inappropriate to Wagner’s artistic vision which implied a full concentration of the audience on the stage and new constraints: large orchestra and choirs, complex staging. With the support of Bayreuth’s bürgermeister, who saw it as a chance to promote his city, it was decided to build a new theatre dedicated entirely to Wagner’s operas. Wagner was the sole master on board. He had the authority to carry out the plan as he wished, and impose his own artistic choices. But he needed to find the funds to do so.

He based the architecture on abandoned plans by Gottfried Semper for an opera house in Munich – without actually informing or consulting the architect. In the search for funding he was repeatedly refused assistance by Bismarck, sought backing from associations set up by friends to support the project and launched fund-raising campaigns. The results of all these efforts were disappointing, and Wagner was obliged to make up his differences with Ludwig of Bayern, who granted him a modest sum of 100,000 Thalers. Construction could begin, and the first stone was laid on 22 May 1872, Wagner’s birthday. This symbolic act marks how closely the project was identified with the composer.

Wagner’s opera has cost 70 times less than the Opéra National de Paris (Snowman, 2009)

The new opera house was inaugurated on 13 August 1876 with the first performance of the complete *Ring* cycle, directed by the composer and conducted by Hans Richter. Nietzsche, Bruckner, Grieg, Tchaikovsky and

Liszt were all in the audience. The early years were financially disastrous, but the greatest artists flocked to perform at Bayreuth, even for no fee. After Wagner's death in 1883, his productions of *Parsifal* and *The Ring* continued to be performed unaltered for almost 40 years. Despite its immense artistic success, the festival also owed its survival to public funding and the support of influential admirers of Wagner's work.

Depending on whether the observer enjoys Wagner's operas and whether they have had the opportunity to see and hear some or all of his ten works performed at Bayreuth, the Festpielhaus may be felt to be a theater unique in the world due to its overall qualities, a temple to the memory of the composer, or a fetishistic enterprise. The Bayreuth Festival Opera was a project conceived by a composer for performing his own operas as he wished, whereas the Opéra Garnier was as much an artistic project as a social and political one.

Garnier, the palace of the French second empire

5 January 1875 saw the inauguration in Paris of the new opera house designed by Charles Garnier, which became the showpiece of Baron Haussmann's reconstructed Paris. Napoleon III had been deposed in 1870 and died 2 years later, destined never to see the opera house he had commissioned, and which was designed and built for his own flattery and pleasure. The story goes that when Garnier presented his plans to Empress Eugenie, she exclaimed in surprise: "What an ugly duckling, that's not a style, it's neither Greek nor Roman!" To which Charles Garnier is said to have answered: "It's the Napoleon III style, Madame!" Only after the renovation of 2000 did the initials N and E, for Napoleon and Eugenie, intertwined and covered in gold leaf, take up the place Garnier had reserved for them on the building's pediment. All ambiguity was removed: the Palais Garnier was indeed an imperial palace!

With its baroque architecture, the exterior of the Palais Garnier is remarkable for its abundance of opulent decoration. The interior is sumptuous: polychrome marble, bronze, gilding, mosaics, golden eagles, busts and glasswork. The monumental grand staircase is a richly coloured space, as is the 54-metre-long grand foyer and the red and gold Italianate auditorium, lit by a gigantic crystal and bronze chandelier weighing more than eight tonnes. The visitor's attention is bombarded on all sides by innumerable evocations of the arts and artists, and the accumulation of shapes, colours and materials. At the time, it was the largest theatre in Europe. It symbolized the splendour, the luxury and the amusements of the Parisian bourgeoisie. The narrow corridor

leading to the ballet foyer was reserved for gentlemen coming to visit the dancers.

The Palais Garnier was opened by the French President MacMahon, in the presence of the Lord Mayor of London, the Spanish royal family and the mayor of Amsterdam. Charles Garnier, the creator of the monument, was invited to pay for his seat in the upper circle. The politicians clearly took precedence over the artist!

The Palais Garnier was designed for gatherings and society talk, the Festpielhaus as a place of pilgrimage for Wagner devotees: the former to dazzle visitors, the latter to hear the works of the master of Bayreuth better than anywhere else in the world. This is reflected in the main features of the two buildings.

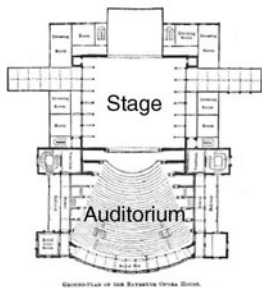
Comparison of the two architectures

Beyond their decorative features – pomp and ceremony in one case, simplicity and modesty in the other – these two opera houses differ in the way spaces are allocated, the relationship between the auditorium and the stage, and the conceptions of opera expressed through these factors.

What immediately strikes the observer of the two ground plans presented on Figure 5.1 on comparable scales is the great difference between the socialization areas and the relative similarity of the areas devoted to the performance itself: the auditorium and the stage.

The capacity is similar in both houses, with approximately 2,000 seats, but the rows of seating are arranged in totally different ways. At the Palais Garnier, seats are laid out in a horseshoe shape in the same way as any Italianate theatre, so that a large section of the audience is not directly facing the stage and can only see part of it, sometimes very little. Ten per cent of the seats actually have no view of the stage at all. However, most of them are good for seeing the rest of the audience, and for being seen. In Bayreuth, the seats are arranged in arcs around an invisible central point two thirds of the way downstage. The spectators seated furthest from the centre can see more than half of the stage without having to turn their heads, and there are no seats with zero visibility.

At the Palais Garnier, the boxes contain 700 seats, and people used to receive their friends there. The first three rows of boxes had adjoining salons, behind curtains that could be closed to engage in activities unrelated to the opera or ballet. Bayreuth eschews the traditional U-shaped structure, and the stalls are laid out in amphitheatre form as in ancient Greek theatres, putting spectators on a somewhat equal footing before the opera. This impression is accentuated by the discomfort of the seats,



Main dimensions (in metres)		
Stage	Bayreuth	Garnier
Proscenium arch height	13	17
Depth	22	27
Width	30	49.5
Surface area	660 m ²	1,336 m ²
Stage tower	50	60
Auditorium to stage*	33	30
Foyers and similar	Practically non-existent	2,000 m ²

Note: *Horizontal distance from the stage to the back row seats.

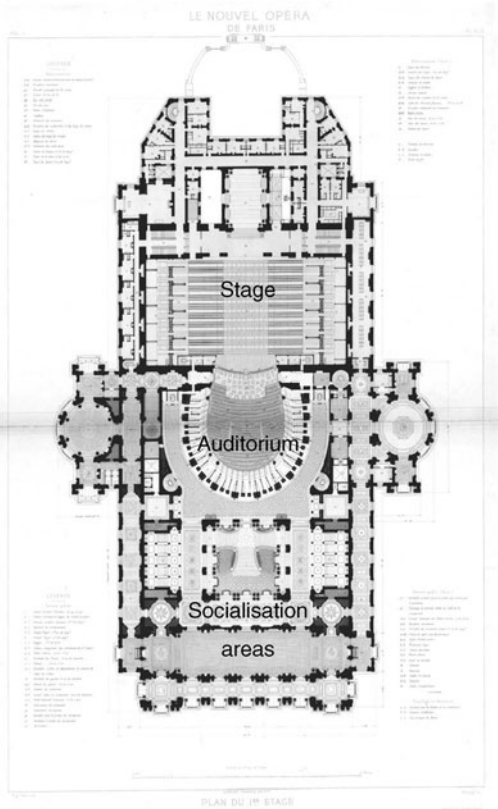


Figure 5.1 The Bayreuth Festspielhaus and the Palais Garnier (ground plans on similar scales)

which are foldaway seats with no armrests, covered with a thin layer of fabric. For proper concentration on the music, the audience used to be advised to bring cushions!

The orchestra pit is one of the principal innovations at the Festspielhaus. It is laid out in tiers sunken below the stage. The conductor, on the top tier, is visible to the orchestra and the singers but masked from public view by a wooden “hood”. With the orchestra and conductor hidden from view, the audience is not distracted by their movements and can focus totally on the drama and music. This hooded orchestra pit facilitates a relative fusion between the timbres of the instruments.

Music emanating from an invisible orchestra carries mysterious qualities that can stimulate the imagination. All the specialists attribute Bayreuth's outstanding acoustic balance between orchestra and voices to its pit layout, but they also note that it can cause synchronization problems between the orchestra and the singers. These problems have recently been attenuated through the installation of TV monitors on the stage. More prosaically, the pit design reduces the distance between the audience and the stage. The Palais Garnier also achieves this – by wrapping the auditorium round the stage like all Italianate theatres – but at the expense of visibility. The concern for focusing audience attention on the essentials is also expressed at Bayreuth in the way all auditorium lighting is turned off: nothing has to exist except what happens on the stage and its musical expression.

The double proscenium arch separating the auditorium from the stage creates an illusion of distancing, a “mystical abyss” as sometimes said, which catches the audience's attention and imagination and makes spectators receptive to the mythical message of his operas.

The chief difference between the two opera houses lies in the areas set aside for reception, gathering and socialization: approximately 2,000 m² at ground level, plus smaller areas on the upper floors at the Palais Garnier; hardly any inside the Festspielhaus.²

The Palais Garnier's grand foyer is designed to be a meeting place for spectators. It was inspired by the galleries of renaissance and 17th-century French chateaux. Its volume is amplified by bay windows opening onto the streets and facades, and large doorways to two salons, leading to the grand staircase galleries.

The Festspielhaus is designed like a museum whose collection is the repertory consisting solely of works composed by its creator. The Palais Garnier must be able to present all operas from the past that are worthy of the setting, and all the masterpieces of the future. These artistic choices – a closed, restricted repertory in the first case and an open, boundless repertory in the second – are given appropriate expression in the architecture.

In the open space around the Bayreuth opera house, vast technical premises have been progressively installed to construct and store resources for the six or seven productions staged during the festival each year. There are extensive transport facilities to transfer materials rapidly to and from their storage area and the stage area. Seven different productions can thus be presented in the course of a single week.

At the Palais Garnier, cooped up in a cramped urban space and endowed with vast reception areas, the surfaces and resources devoted to

the actual stage productions were considered gigantic when the theatre was first built, but turned out to be inadequate for an extensive repertory when painted backdrops were replaced by three-dimensional sets. The alterations needed for alternation of operas were abandoned, and the Opéra Bastille was built instead. Ch. Garnier almost died a second time.

Meanwhile, the Bayreuth opera house with its apparently unchanging vocation benefited from investments in sets and scenery which, without undermining the initial choices, have made it one of the most modern theatres in Germany, and probably in the world.

Two theatres that symbolize opera today

Both opera houses now have state-of-the-art scenery technologies. At the Palais Garnier, originally manual operations have been automated and computerized, and the lighting has also undergone remarkable modernization. The back stage area has been slightly extended, but there has only been a very modest improvement in set-handling capacity. This theatre was designed for backdrops and wires, not solid three-dimensional sets. Things are very different at Bayreuth. First of all, the back stage area, which opens onto the gardens outside, is connected by a permanent track to another very large building used both for temporary storage and assembly. This makes it possible to alternate between seven different productions in 7 days! This was the case during the 2009 festival, which presented the four *Ring* operas, *Tristan*, *Meistersinger* and *Parsifal* in the same week (the last two productions being particularly complex and labour-intensive). Bayreuth has the technology to slide scenery to the back in just a few seconds, and to sink it or bring it up from below stage very speedily. Originally designed to serve a composer and his works, then probably to disappear after a single cycle of his principal operas, the Bayreuth festival opera house has become a national showcase for opera, culture and industry. The festival opening is a prestigious event attended each year by Chancellor Merkel and heads of state invited from other countries. The distinguished showcase provided by the Festpielhaus has prompted German industry to finance many of the “stage technology” advances.

Once the Opéra Bastille was opened, it was initially decided that the Palais Garnier would no longer be used for operas. Its capacity and set facilities were no longer suitable or adaptable to recent changes in opera productions. To reach break-even point between variable costs and box office income, twice as many performances were needed at Garnier as at Bastille (Agid and Tarondeau, 2006, pp. 170–3). Nonetheless,

the Palais Garnier was subsequently equipped with the latest stagecraft technologies and regained its original role as a symbol of opera in Paris.

Two symbols and three paradoxes. The first paradox is that the Bayreuth Festspielhaus, one of Germany's most modern opera houses, with a capacity comparable to Covent Garden, the Barcelona Liceu, La Scala in Milan and the Teatro Real in Madrid, is only used for performances 6 weeks in the year. The second paradox, analysed and lamented by Pierre Boulez, is that the Festspielhaus has no successors, whereas the Italian horseshoe has countless imitators! The third paradox is that the Palais Garnier, despite its rigidity and economic handicaps, remains the symbol of opera in France.

2. Theatres of past and present

For opera house management, theatres offer opportunities and constraints. The shape, size and facilities of the stage determine whether it is possible to alternate productions, and dictate production policies. When there are no facilities for storage or rapid transport of sets and props, only the stagione production mode is possible. The size of the orchestra pit may rule out operas needing large ensembles of musicians. A small proscenium arch and close proximity between stage and auditorium tend to favour intimate works rather than the grand and spectacular. Costly productions require large-capacity theatres.

To illustrate these themes, we analyse the plans of some 20 recently built or renovated opera theatres, comparing them with the two major symbols of the Bayreuth Festspielhaus and the Opéra Garnier in Paris.

Auditorium shape and capacity

Two auditorium shapes clearly emerge: the Italian-style "horseshoe" where, as at the Palais Garnier, a sizeable section of the audience is not facing the stage, and the "cinema", "fan" or "diamond" shape where, on the contrary, all spectators face the centre of the stage, as at Bayreuth.

The two shapes are unevenly distributed in our sample, and probably across all opera theatres. Italianate auditoriums are found in Barcelona, Bordeaux, Cardiff, Dresden, Gothenburg, London, Lyon, Madrid, Milan and Oslo, where traditional auditorium layouts have not been affected by major restructuring work and where new theatres obey the traditional rules. Most of these theatres were initially designed more than a century ago. The oldest, Turin's Teatro Regio, was inaugurated in 1740, La Scala in 1778 and the Grand Théâtre in Bordeaux in 1780. The most recent were opened in the mid 19th century at the heights of opera's golden

age: the Opéra de Lyon in 1831, the Semperoper in Dresden in 1838 and the Teatro Real in Madrid in 1850. The main changes made to these old opera houses concern the stage itself, and the set and scenery facilities. The auditorium has been retained unchanged, or in some cases been reduced in capacity. La Scala in Milan originally had 3,600 seats in 1778, but this was reduced to 2,030 when it was reopened in 2004. In 1740, the Teatro Regio was Europe's largest theatre, seating 2,500; today its capacity is 1,592. It has been rebuilt as a "diamond" in 1973. Another example is the San Carlo theatre in Naples, Europe's oldest theatre, whose capacity has fallen from 3,000 seats in 1737 to 1,410 today. In Lyon, Jean Nouvel retained the 19th-century facades that complement the facades of the Hotel de Ville standing opposite, and built an Italianate auditorium with capacity reduced to 1,100 seats. The current director of the Opéra de Lyon considers that 600 additional seats would make it possible to balance the books without saturating demand.

This "copy and paste" policy is explained by the concern to protect an outstanding architectural heritage, with which the intellectual and social elite identifies in each town concerned. The continuing supremacy of Italianate auditoriums is thus assured. A study of the situation of Italianate opera houses in the period 1987–90 concludes that the "heritage" factor, their technical obsolescence and the size of their auditoriums are all obstacles to the development of opera in Italy: "Over the last three centuries literally thousands of theatres have been built, many of them rare jewels of architecture and acoustics. It thus comes as no surprise that of the buildings used by the Opera Houses (in Italy) only three have been built from the ground up in recent times. . . . The first stumbling block is the size of theatres . . . the average number of seats available per theatre is only a little over 1,200, yet main theatres such as La Fenice in Venice and the Teatro Comunale in Bologna have capacities of less than 1,000."³

In short, the oldest theatres have been preserved in their original forms, but with reduced capacity. What of more recently built theatres?

Glyndebourne, Gothenburg and Oslo opera houses are the only recently built Italianate theatres that were not inherited from the past. They have adopted the traditional style while eliminating its shortcomings in terms of visibility and comfort. In Oslo, "the form of the auditorium is based on several relationships: short distance between the audience and the performers, good sight lines, and, above all, excellent acoustics". The "horseshoe" is more open, and the seats face the centre stage more directly. Decoration is restrained, using natural materials selected for their acoustic qualities, rather than the extensive

embellishments of the past. An identical conception prevailed in Glyndebourne. The current theatre was built in 1997 and is totally new.

To varying degrees, six of the theatres in our sample have escaped the norms of the Italianate theatre: Copenhagen (2005), Erfurt (2003), Helsinki (1993), Houston (1987), Paris Bastille (1989) and Valencia (2005). As their inauguration dates show, these are recent theatres. Their auditoriums are generally fan shaped as at Bayreuth or diamond shaped as at Houston or Helsinki, with good visibility for all spectators.

Dallas, Sydney and Beijing opera houses could be added to the list.

Paul Andreu's "egg shell emerging from the lake" design in Beijing, inaugurated in 2007, symbolizes the birth of a great international capital of culture. It contains three theatres: a "cinema" style opera theatre providing excellent visibility for all 2,416 spectators, a concert hall seating 2,017 and a theatre with a capacity of 1,040 for traditional Chinese opera.

The new opera house at Dallas, inaugurated in 2009, was designed by Norman Foster with the aim of broadening the audience: "to break down elitist barriers and entice a younger, more diverse crowd". The capacity was reduced from the former opera's 3,000 seats to 2,200 in the Winspear Opera, in view of changes in the anatomy of spectators: as the architect Spencer de Grey put it, "People want wider seats as basically they have bigger bottoms."⁴

In Sydney, Jorn Utzon's opera house was inaugurated in 1973 after two decades of heated debate, incomprehension and conflict between the architect and his clients. This magnificent architectural achievement is one of modern architecture's most important monuments, along with Bilbao's Guggenheim museum in Spain. It symbolizes the Australian cultural heritage. It is emblematic of the city of Sydney, and by extension, all of Australia. What are its principal innovations as an opera house? From Bayreuth, it has imitated a covered orchestra pit and the sober black decor intended to eliminate distraction for the spectator. The main auditorium is diamond shaped, surrounded by side galleries. All seats are directed towards the centre of the stage. In short, Sydney owes more to Bayreuth than to the Palais Garnier. It is undeniably an architectural success, but from the functional standpoint of visual and acoustic comfort for the audience or the constraints of opera production, opinions are divided over how successful the building was in its initial form.

Whereas the original objective had announced 3,000 seats in the main auditorium, the capacity of the Sydney opera house is in fact only 1,543 seats, because it was necessary to fit the opera into a smaller theatre due to problems encountered. Is this size satisfactory?

Four criteria appear to be relevant in determining the size of an opera house.

The first, of course, is the influence of the past, which lays down the law for the present. Whether this is a good or bad thing is another matter!

The second criterion is the potential audience size. What size of theatre should be planned in view of the population in the opera's catchment area? Naturally there is a link between auditorium size and potential audience.

Excluding festivals, whose audiences travel from a range of geographical areas, the correlation coefficient between the two variables is significant (0.55). The data shown in Table 5.1 illustrate this relationship, although there are several exceptions. The size of North American opera theatres is generally above average for their category, while European opera houses are generally below average for their category. Based on this criterion alone, Sydney with its 4.3 million inhabitants would require an opera house with at least 2,300 seats.

Table 5.1 Auditorium size and potential audience

Population of the zone	Average seating capacity	Examples: Average size	Examples: Below-average size	Examples: Above-average size
<500,000	1,165	Graz, Leipzig, Mannheim, Strasbourg	Heidelberg	Salt Lake City
500,000–1,500,000	1,378	Dresden, Düsseldorf, Helsinki, Leipzig, Toulouse	Antwerp, Brussels, Lyon, Prague Statni, Riga, Rostov, Zurich	Munich, Vancouver
1,500,000–3,000,000	2,161	Barcelona, Madrid, Vienna Staatsoper	Hamburg, Rome	Dallas, Montreal, San Diego, San Francisco, Seattle
>3,000,000	2,300	Houston, Paris NO	Athens, Sydney, St Petersburg, London ROH, Moscow Bolshoi, Tokyo NNT	Chicago, Los Angeles

With its waterside location, the Oslo opera house and its 1,600 capacity main auditorium offers an original solution for seasonal variability in audience numbers. The building's roof slopes at an angle of 15°. In normal periods, it is accessible to pedestrians and has become a popular walk in its own right. In summer, the roof can be turned into an open-air theatre able to seat up to 8,000 people, with a floating stage set up on the water. In 2009, an outdoor performance of *Carmen* registered a "full roof".

The third criterion is quality and comfort. In modern theatres relatively unaffected by the constraints of the past, acceptable visibility is guaranteed. Acoustic quality is more elusive. "I gave myself pains to answer this bizarre science (of acoustics) but... nowhere did I find a positive rule to guide me; on the contrary, nothing but contradictory statements... I must explain that I have adopted no principle, that my plan has been based on no theory, and that I leave success or failure to chance alone... like an acrobat who closes his eyes and clings to the ropes of an ascending balloon", wrote Charles Garnier in 1880 (Long, 2006, p. 25). Wagner had achieved the same miracle at the Festpielhaus. Nowadays, intuition is assisted by science and technology.

The shape and size of the auditorium, the absorption and reverberation of the materials, and the multi-directionality of the sound all contribute to the alchemy of success. At the Oslo Opera, the shape of the balconies varies according to their position in the auditorium, so that the side balconies reflect the sound towards the audience and the back balconies disperse it in all directions. The back walls are made of convex panels to avoid focalization of sounds and disperse them throughout the auditorium. All the surfaces are made of dense materials, particularly solid oak, to avoid high-frequency vibrations.

In terms of acoustics alone, the medium to large auditoriums (1,600–2,000 seats) appear to perform best (Long, 2006, pp. 656–7). In our database, only seven theatres fall into this bracket. La Scala in Milan, with its 2,030 seats, and the Teatro Colon in Buenos Aires, with its 2,487 seats, fall outside it but are considered the best opera houses in the world by many specialists. At La Scala: "The six balconies and the curved ceiling reflect the sound back to the stage. The facades of the side balconies create a feeling of intimacy and a sound that is clear, warm and sparkling for those in the best seats" (Long, 2006, p. 693). However, the instrumental music is supposed to be better disseminated and perceived than the voices.

On this third criterion, most opera theatres are below what acoustic specialists consider optimum size.⁵ Yet they offer good-quality visual

and sound perception due to the short distance between singers, musicians and spectators. They require less effort of the singers.

The proximity between stage and auditorium is the fourth criterion to consider. In our sample, the furthest spectators from the centre of the stage are to be found in Helsinki (seating capacity 1,350), Houston (2,372) and Barcelona (2,292); the closest are in Copenhagen (1,703), Bayreuth (2,000) and Bordeaux (1,114). On average, the most distant spectators are 47 m from the centre of the stage compared to only 20 m for the closest. A spectator sitting 40 m from the centre of the stage – the typical distance for the furthest seat in a medium-sized theatre – can only visually distinguish between two lines if they are more than 13 mm apart. They cannot make out facial expressions, blinks or small bodily movements. At a distance of 20 m, the distance between the centre of the stage and the closest spectators, the silk of a fabric, the grain of leather, the texture of a wig are of course imperceptible. How much could be saved on sets, costumes and props if the human eye's ability to perceive detail at these distances from the stage were taken into consideration?

To increase the number of seats, additional rows must be added, which may mean placing some spectators further away from the stage. To increase the capacity, the theatre itself can be enlarged by opening up the angles between the auditorium and the edge of the stage, although this reduces the amount of the stage that can be seen by the spectators towards the row-ends. Increasing auditorium capacity thus compromises one of the essential qualities of a live performance: the intimate feeling of being at the heart of the creative act.

If we add that the seating capacity is a vital factor in an opera house's financial balance, the choice of capacity is a trade-off between quality considerations – visibility, proximity, intimacy – and economic considerations – box office income, balance between income and variable production costs. Although we may wonder how far all these parameters are systematically taken into account when an opera theatre is being built or rebuilt.

Stage and pit size

At the opera, the most important events take place on stage and in the orchestra pit.

Opera theatres have a pit between the first row of the audience and the stage. The orchestra pit is the birthplace of the alchemy of sounds that must fill the auditorium with no distortion, time lag or imbalance.

An opera orchestra, in other words, a large number of musicians, can sit there below the audience level such that the instruments do not mask the singers' voices and the music can be properly disseminated throughout the auditorium. The pit size theoretically depends only on the maximum size of the orchestra that will use it. Opera orchestras vary considerably in size, depending on whether the works to be presented are of a more intimate nature, for example, the operas known as baroque operas, which require 25–40 musicians, or whether they demand a greater variety of instruments as is the case for certain operas composed in the second half of the 19th and 20th centuries, from Wagner and Richard Strauss to Prokofiev and Shostakovich, which occasionally need more than 100 musicians. An orchestra pit is generally designed to provide an average 1.5 m² per musician. In our sample houses, the average area of orchestra pits is 132 m², providing enough room for orchestras of up to 80 musicians.

The largest pits are to be found in the modern theatres such as Opéra Bastille in Paris, Helsinki and Valencia, and the smallest in the old theatres where the original pits and auditoriums have been retained through successive renovations and reconstructions, for instance, in Bordeaux, Barcelona and Dresden. In most cases, pit size is very close to average.

Unless it is specially intended for a restricted repertory, the size of an orchestra pit is always the result of a compromise. Too big, and it will create a gap in the stage area, distance spectators from the stage and dilute the sounds in a space that lacks density. Too small, and it will limit the programming possibilities, ruling out operas requiring very large orchestras. The most modern theatres have modular orchestra pits so that their size and level can be adjusted given the needs.

Between the pit and the stage, the safety curtain marks a separation between two worlds. On one side, the auditorium and orchestra pit represent just 5–10 per cent of the total surface of the opera house, and on the other, the stage and back stage, the rehearsal rooms, workshops and technical departments that work on preparation and production of performances.

Stage surface, organization and facilities

The stage area, that is to say the stage and areas around the stage, is the centre of gravity of any opera house. This is where the performance is prepared, displayed and dismantled. Sometimes the “back stage”

area extends to several levels, connected by service lifts. Most large opera theatres have large-scale back stage areas and modern equipment making it possible to alternate productions and assemble, transport, change and store the bulky three-dimensional sets that are the rule in today's large houses. This is achieved through a variety of arrangements.

Houses built "from scratch" have all the necessary resources for production of sets and props, assembly and dismantling equipment, and transport and storage facilities in a single space. Their backstage areas often occupy a very large surface.

The Opéra Bastille in Paris was built between 1984 and 1989 by Canadian architect Carlos Ott, and a German stage designer Michaël Dittman. The back stage areas contain four storage areas as big as the main stage itself. Sets are moved between them by automated trolleys and turned on a rotating platform of the same size. Scenery can be taken directly to the rehearsal stage, which is identical to the main stage. The total surface area of these spaces, excluding the main stage, is approximately 5,000 m², meaning three productions can be handled simultaneously: two in performance and one in rehearsal. "The principal innovation at Bastille is the existence of the Gounod room where the stage director can work with the singers for several weeks using the actual set; and also the number of areas dedicated to technical work. Last, because the workshops are very close by, sets can be altered very quickly to meet the stage director's needs better".⁶

Like the Opéra Bastille, the Oslo Opera, inaugurated in 2008, comprises both stage areas and resources, and technical departments and workshops. On the east side of the "Opera Street" corridor, which divides the buildings into two, are the production workshops and administrative offices. To the west are the public areas and the areas used for preparation of performances. The main 256 m² stage is flanked by two "side stages" and prolonged by two back stages of equivalent surface area. The sets and scenery for several productions can be stored back stage or side stage, and also below stage. The rehearsal room is directly connected to the stage area. These spaces are directly accessible from a landing stage a few metres away from one of the side stages.

The Gothenburg Opera, inaugurated in 1994, has only 1,276 seats and stages only half as many operas as Opéra Bastille, but its stage area covers almost 1,300 m², organized in a cross shape with two side stages to the left and right of the main stage and one back stage with a lift and rotating floor. As at Bastille and Oslo, the technical workshops are right next to the stage areas.

Copenhagen's Kongelige Teater, which opened in 2005, has two side stages, two back stages and a rehearsal stage for its production logistics. A stage area with a similar surface and layout to Opéra Bastille enables this opera house to present approximately 50 productions each season.

The Wales Millennium Centre, home to the WNO in Cardiff, was opened in November 2004 by Queen Elizabeth. Its design follows similar principles: to facilitate preparation and alternation of productions by having additional stage areas on the same level as the main stage, and rehearsal areas on the upper floors. The Centre also needs enough flexibility to adapt to a variety of artistic disciplines. The acoustics must be perfect for orchestral music, choral singing and solo voices, as well as for recorded sound. The required flexibility is achieved through use of mobile surfaces able to reflect or absorb sound.

When serious space constraints make it impossible to locate these areas immediately around the stage, transport and handling facilities are designed – as at Bayreuth – to transfer productions from the external places of creation and storage to the place of performance.

At the opera houses in Madrid and Lyon, located in an unchanging historical urban setting, it was decided to facilitate access for container-carrying trucks at street level and distribute the contents among the upper floors. In a similarly confined urban environment in Las Ramblas, the designers of Barcelona's new Liceu theatre have put set assembly areas six floors underground in the building's basement. A spiral access road has been constructed to take the trucks below stage to the actual place of assembly. At Opéra Bastille in Paris, components of set and scenery are unloaded from containers at street level and then taken down by lift to the assembly area.

The Aalto Theater in Essen, opened in 1984, is considered just as successful an achievement for the audience: it has a medium-sized auditorium guaranteeing visibility from all seats, ample, pleasant public areas, but also a stage and set-handling facilities appropriate to its high level of activity – 16 productions and 107 performances in 2008–09 – under the repertory mode. The main stage has two side areas and a back stage area of equivalent size.

The Erfurt Opernhaus, inaugurated in 2003, despite its modest 800-seat capacity, has a stage area of 1,440 m² with one side stage and a back stage making it possible to present a range of different productions over the season. The production and assembly workshops for sets, costumes and props are located in a separate building, but are directly connected to the stage. All the facilities are state of the art.

At the old theatres, which were not designed to handle more than one production at once or heavy, voluminous sets, modernization has focused on the back stage area and its facilities.

This is the case at London's Royal Opera House, which reopened in 1999 after a complete overhaul. The departure of the fruit and vegetable market from Covent Garden in the 1970s freed up the area around the opera house. A second auditorium and orchestra rehearsal room were created, and technical departments were rationalized with a new stage area, storage and workshops. The architectural alterations were extreme and spectacular, but the main auditorium and its 2,267 seats remained practically unchanged. At least visibly unchanged, but the new auditorium has been designed to be easily convertible into a hall for dances, meetings and exhibitions.

The Dresden Semperoper, like many German theatres, was rebuilt after the war since Dresden had been destroyed by bombs in 1945. All that was left of the opera house was its outside walls and a few statues. The new Semperoper, which opened in 1985, largely followed the original plans. The back stage area was enlarged to facilitate preparation of performances and rehearsal rooms were added, but the seating capacity was reduced to 1,309.

Mario Botta's renovation of La Scala in Milan stirred up great controversy among the protectors of this historic building. The auditorium was preserved, but the stage was completely reconstructed, and above all the back stage area and facilities were entirely demolished and rebuilt so that more productions could be staged in alternation. Just as at its opening in 1778, La Scala reopened on 7 December 2004 with Salieri's opera *Europa riconosciuta* in a salute to history and tradition.

3. Architecture as a factor of success or failure

First of all: "It must be remembered that one of the 'economic constraints' on the Opera Houses is precisely that many of their houses are historical theatres whose stages do not allow a rapid turnover of productions with different sets and whose attendance capacity is often extremely limited."⁷ This indisputable observation concerns Italian operas, but it could be extended to many opera houses in areas of the world that have a strong operatic tradition such as Germany, Austria and neighbouring countries in Eastern Europe. It applies to France, where the Royal Opera at Versailles, built by Gabriel during the reign of Louis XV and inaugurated in 1770, has just been restored for a total cost of

€13.5 million.⁸ It can only receive – although in royal style – 660 spectators per performance, for just 30 performances each season. The heritage of the past has been preserved, but the economics of the performing arts are far from improved.

The constraints and opportunities of architecture

One of the great debates between business strategy specialists can be summed up as follows: does strategy come before or after structure?

In recently built theatres, it is understandable that the architecture – the structure – has been designed in view of and to serve a strategy, in this case the types of performances presented, the pace of activity and the production modes. The architecture and layout of the different areas thus offer many opportunities: an increase in seating capacity, better visibility, sound quality and services for spectators, rationalization of production, assembly, transport and storage resources, extension of the repertory and more revivals to optimize use of the theatre and reduce production costs, as can be observed even in modestly sized theatres like Essen and Erfurt. Adjustable spaces make it possible to differentiate activities. The Grand Théâtre in Shanghai, for instance, has put on operas, musicals, ballets, symphonies, chamber music, spoken drama and Chinese operas since 1998.

In the old theatres, and in some renovated theatres, history and architecture at least partly dictate strategic choices. Old auditoriums, or those that have been restored with no change in capacity, lead opera houses to have a large number of productions and continue to pursue repertory strategies. This is the case at many German houses, although audiences are apparently beginning to tire of the practice. The urban fabric wrapped tightly round the theatres at Barcelona, Lyon and Madrid is what limits expansion of the artistic and technical production spaces, and therefore the artistic choices. Tomorrow's opera houses could be constructed on the edges of cities, like Bayreuth (when originally built) or more recently Valencia. The Houston Grand Opera performs at the Wortham Theatre Center, which occupies a vast area of the "Theater District" on the edge of downtown Houston, very close to the freeways that cross the city. The Winspear Opera in Dallas is housed in the AT&T Performing Arts Center with the 600-seat Wyly Theatre and the 750-seat City Performance Hall, in a 4-hectare park at the hub of a major network of freeways and public transport. Could cultural and performing arts centres be imagined on the edges of the major European cities? Cardiff's Wales Millennium Centre, the Oslo Opera, and on a more modest scale the auditorium at Dijon, represent moves in that direction.

Architecture and economic performance

In explaining an opera's managerial performance, it is of course impossible to separate the effects of the theatre's architecture from all the other possible factors. However, it is established that the seating capacity has a positive effect on an opera house's financial autonomy and its occupancy rate. This point was discussed earlier in Chapter 1, and we shall return to it in Chapter 9.

Architecture of theatres where opera performances takes place interferes or interacts several times on the opera house or company income issues.

A first interference exists between the auditorium size and its effective or potential audience market. Auditorium capacity has to be seen in the context of their local markets, but theatres in very large cities often have problems when their capacity is between 900 and 1,500 seats. In Europe, some of the very old "heritage palaces" are currently used in their original form, after modernization or sometimes rebuilding to the original plans, for example, the Prague State Theatre, the Lyon Opera house, the Salle Favart at the Paris Opéra Comique, the Fenice in Venice, the Théâtre de la Monnaie in Brussels, and soon perhaps Berlin's Staatsoper Unter den Linden. The architecture is presented as an imperishable link between the past and the present, a symbol of the impossibility of moving with the times. The "heritage palace" perpetuates the physical capacity of the auditorium, which as seen earlier has a decisive influence on the economic performance of opera houses.

In contrast, restoration of European capitals' old theatres to the original plans does not raise the same problems when they have a capacity of 2,000 seats or more and when the stage and scenic facilities have been modernized (for example, Covent Garden (1999), the Liceu (1994), La Scala (2004)).

When New York's old Metropolitan theatre was abandoned for the 4,000-seat auditorium built at the Lincoln Center, there was no decisive public protest over the leaving of the historical theatre. In Europe, the move would very likely have caused an outcry.

On either side of the Atlantic, places other than theatres are sometimes chosen as the settings for opera performances: ancient Roman arenas in Orange, France and Verona, Italy, disused factories for Germany's Ruhr festival, the former cereal market in Toulouse, and in the USA, the more unusual venues of a swimming pool and a car park, both used by the Long Beach Opera for contemporary operas.⁹ In some

cases these choices stem from a desire to be free of what is considered excessive theatre maintenance costs, and other alternative venues are used because the normal theatre is being renovated, or because the company prefers more unusual, and sometimes very large venues to their traditional theatres.

Another interaction exists between the size and shape of auditorium and box office issues. This interaction is a very tough and difficult one for several reasons and satisfying solutions are not easy to provide. When considering the factors to be combined that are, on the one hand, good visibility and acoustic comfort for the larger number of spectators and, on the other hand, the number of seats, contradictory objectives may appear. Good visibility and acoustic comfort suppose rather small- or medium-sized auditoriums built on the amphitheatre model and not on the horseshoe. But very large auditoriums are sometimes the best answer to the audience market and then visual comfort is average or low for those spectators seating far from the stage. But the larger the auditoriums are, the easier the balance between maximization of the box office and the opening of the auditorium to a wide audience through acceptable price levels. Issues and good or poor solutions differ from place to place. Ticket prices are sometimes limited by the lack of comfort or visibility in some parts of the auditorium: there are seats with little or zero visibility, as in some European opera house theatres, as in balconies and side galleries in most Italianate theatres, seats where the surtitles are illegible, seats a very long way from the stage, as in some of the greatest American theatres, standing places, as in a great many German houses and so on. Without ignoring the special price policies – implemented on very different scales at different opera houses – aimed at certain audience categories, particularly young people, these negative factors force low prices for these seats, bringing the average ticket price down. But at modern theatres designed along the same lines as the Bayreuth Festspielhaus, where all seats offer a better similar quality of sight and sound according to their distance from the stage, the difference between the highest and lowest price can be reduced, all other things being equal, thus improving the financial potential. In absolute terms, ticket price discrimination, which is known to have positive effects for seat occupancy rates and box office income, should result from the opera management's strategic aims – to maximize income or attract new audiences – rather than from architectural constraints.

A third interaction between the theatre architecture and the management model depends on the stage and scenic facilities. Operas are also performed nowadays in an enormous number of non-specialist theatres

known deservedly as “multipurpose”. Some houses and companies lease the theatres they need for specific periods: this is quite common in the USA and sometimes observed in Europe (Cardiff). In Europe, most opera houses with their own theatres tend to diversify their artistic activities; Germany’s Musiktheater divide their time between opera, ballet, concerts and occasionally operettas and musicals. There are thus “multipurpose” theatres everywhere, even though management may differ.

Then, whatever the administrative link between an opera house or company with the theatre used for opera production and performances, the best interest of the theatre management is to be able to run as many events on the ensemble main stage/main auditorium. This commands modern scenic facilities and equipment.

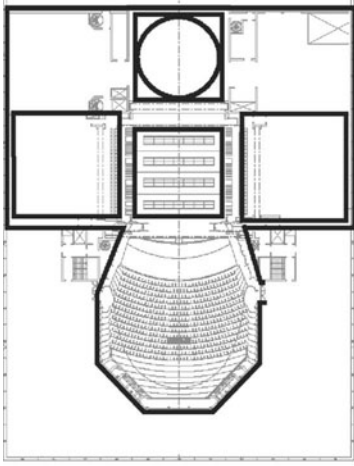
The capacities for alternation offered by the generous stage areas found in many German theatres and new or recently renovated theatres can increase audience sizes by extending their catchment’s area (as seen in the case of festivals), improve the seat occupancy rate in the main auditorium and increase the number of performances per season.

The cost of productions and tickets also depends on the architecture and layout of the building. It is easy to understand that the cost per ticket falls as the number of tickets on sale rises. Naturally, the cost of productions increases with transport distances and difficulties between workshops, assembly areas, rehearsal rooms and the main stage.

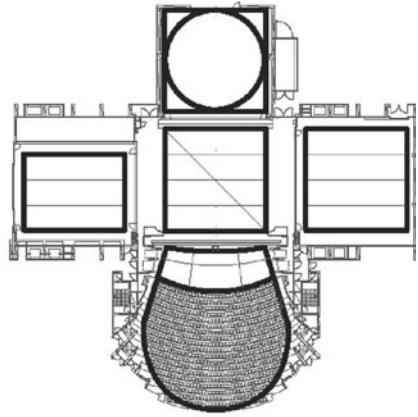
Conversely, having massive back stage areas, stages and proscenium arches could generate a negative “space effect”, although we were unable to confirm this from our observations.

Four observations

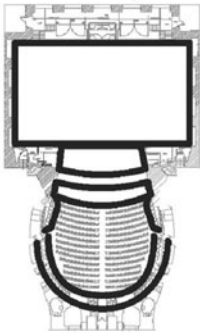
Several architectural aspects of Europe’s oldest opera houses are in many cases difficult to reconcile. When they are monuments of artistic value, preserving them for the national heritage involves high maintenance costs. The visual and musical experience they offer is far from satisfactory for most of the audience. The size of the auditoriums, which partly determines their economic operation, limits box office income and restricts the possibility of attracting greater numbers. The first two of these aspects cohabit, sometimes unhappily, with the third. It is true that both depend on the pace of activities at each opera house, the production mode used and the type of funding. The more sustained the pace of production, the more problematic the reconciliation of all three demands when theatres are small. Italy, as we have seen, is where the situation is the most critical.



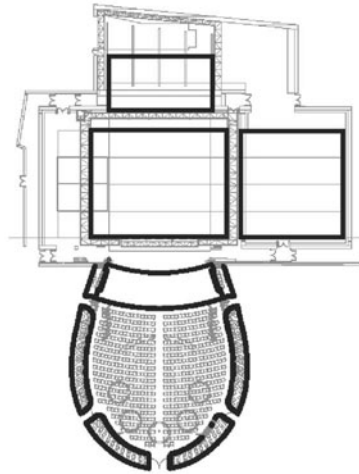
Göteborg Opera (1994, 1,276 seats)



Finish National Opera
Helsinki (1993, 1,350 seats)

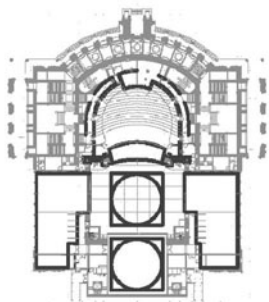


Opéra National de Bordeaux
(1780, 1,114 seats)

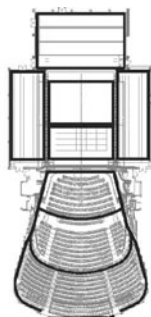


Gran Theatre del Liceu
Barcelona (1999, 2,292 seats)

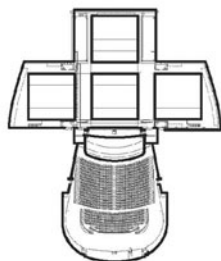
Figure 5.2 Opera house architectures



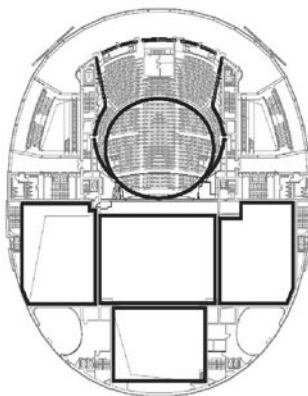
Semperoper Dresden (1838, 1,300 seats)



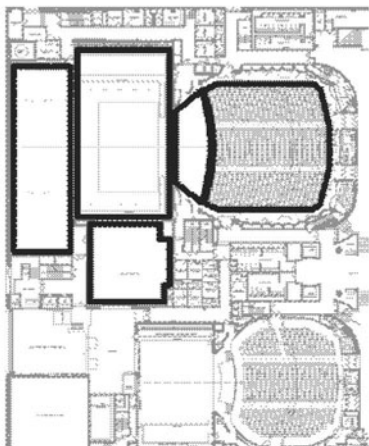
Welsh National Opera Cardiff
(2004, 1,848 seats)



Palau de les Arts Reina Sofia
Valencia (2005, 1,412 seats)



National Center for the Performing Arts
Beijing (2007, 2,416 seats)



Houston Grand Opera
(1987, 2,200 seats)

Figure 5.2 (Continued)

In the major European national and regional capitals, many renovations of old opera houses have been successful. Compromises have been found between historic preservation of theatres to which the public is greatly attached for emotional as much as cultural reasons, and modernization that had become vitally necessary for the stages and set-handling facilities. Acceptable compromises have also been found between the three aspects of heritage, comfort and operations whenever the seating capacity reaches or exceeds 2,000. Opera houses as different as Munich's Bayerische Staatsoper, Covent Garden in London, La Scala in Milan, the Liceu in Barcelona and Madrid's Teatro Real have achieved conclusive results through extensive use of renovated stages and auditoriums that have been restored without alteration, but are of sufficient size for acceptable economic operation.

Reasons for being optimistic and a final wish

The new opera houses built in the last 20 years, or theatres used for opera performances in Europe and the USA, are generally successful whenever the relationship between the auditorium size, the expected audience numbers per season or per year and the operation and production modes used are all correctly and simultaneously considered. Examples include the theatres used by the opera houses or companies of Amsterdam, Cardiff, Copenhagen, Dallas, Dijon, Erfurt, Essen, Fort Worth, Gothenburg, Oslo, Paris (Bastille) and Valencia.

As in the past, from Houston and Santa Fe to Beijing, Shanghai and Sydney, via Oslo and Copenhagen, recently built theatres symbolize the cultural ambitions of the people who commissioned them. They draw on innovations inherited from the great examples of the past such as the Bayreuth Festspielhaus and the Palais Garnier, benefit from the most recent innovations in stagecraft and technology, and are vaunted as major works of contemporary architecture (Figure 5.2). In this way, they associate the tradition with modernism.

The principal challenge today concerns the design of theatres to be built in the near or relatively near future, whether exclusively intended for opera or more probably for a range of activities encompassing music, dance and opera. The horizon time of an opera house (or a theater general) manager varies between 5 and 15 years. The duration life of a theater may be 50 to 100 years. This is why anticipation of various artistic possibilities of a theater is at the same time difficult but necessary when it comes to building new theaters.

Pierre Boulez vigorously calls for new innovations in the conception of theatres intended particularly for opera. "Architects like Frank O. Gehry should be called on to find a modern form that is interesting. We need architects who know something about music."¹⁰ Fascinating projects await the future designers and builders of new opera theatres.

6

Funding Opera Houses

People unfamiliar with opera house economics often ask why these institutions are not profitable. There are two classic answers to this question. First, opera houses are incapable, in both Europe and the USA, of generating sufficient income from the sale of tickets and other products to cover their operating costs. Additional funding is invariably needed. Second, opera houses usually settle for the goal of a balanced budget rather than a profit, and often succeed in achieving that. Are the two answers contradictory?

In their annual reports, opera houses, be it the Lyric Opera of Chicago, the Liceu in Barcelona or Covent Garden in London, emphasize their well-established track record of successfully balancing their budgets for many years. The American accounting terminology allocates the income of opera houses into two categories: earned income, generated mainly from the box office or from other commercial operations, and contributed income, which includes all private grants, donations and public subsidies. This terminology can be generalized. The accounting structure of the *Deutscher Bühnenverein Theaterstatistik* permits a comparison with the American framework, at least up to a point. In Europe as in the United States, the strategic value of contributed income is measured with reference to the amounts generated by earned income, and especially by box office revenues. In Europe, where public funding secures the very existence of opera houses, box office revenues generally represent a small proportion of their resources. Today, apart from a few outstanding exceptions, private grants and contributions remain rare in Europe. In the USA, where contributed income comes mainly from private sources, earned income is on average twice as high as in Europe.

1. Three funding models

Three different models of opera funding appear from different data bases (*Opera America*, *Deutscher Bühnenverein*, *Opera Europa*, *Réunion des Opéras de France*), from our own data base and from our discussions with opera managers.

Significant and decisive public subsidies and a marginal box office: a dominant model in Europe

For the sake of artistic and social traditions, most European opera houses receive public subsidies to finance the bulk of their costs. The same holds true in the formerly communist Eastern European countries. Culture and the arts are considered to be public goods and properly subsidized. Earned income represents an average of 20 per cent of the budgets of opera houses, and often less. All the efforts intended to diversify the public, build audiences and attract younger spectators take centre stage in the setting of pricing policies. Affordability is a major concern shared by all, but maximization of box office revenues, or even raising them to a significant percentage of total income, is not an overriding goal everywhere. To fill the gap between earned resources and operational costs, most European opera houses rely on public entities – cities mostly, but also régions, départements, provinces or Länder, depending on each country's organization – and sometimes on central state administrations such as national ministries of culture. "All German opera houses are dependent upon the financing of their public support body", says Professor Gerd Uecker confirming that the importance of their financial support is generally calculated as the difference between the (earned) revenues of the theatre and the total budget inscribed in the theatre's financial plan. These entities supply up to 80 per cent, and sometimes more, of the funds required to balancing opera house budgets. Today, despite some recent developments, private grants bring only a small portion of revenues.

Finding the balance between box office and private contributions: the American model

Contributed and earned incomes represent 85–90 per cent of the total direct income of American opera houses. The remainder of their income stems mainly from the utilization of previous donations that were temporarily restricted, and partly from revenue generated by endowments. In the USA, the box office produces on average 36 per cent of the total income of opera houses, against 8–20 per cent in Europe. Another

16 per cent comes principally from sponsored events and other commercial operations. The rest of their funding – 50 per cent, on average, of the total – is contributed income, which comes from donations eligible for tax deductions. Public subsidies are not financially significant. Strong connections between funds of private origin and box office revenues differentiate American from European opera houses. In the USA, a significant number of individuals contribute donations in addition to giving important support to the box office through the regular purchase of opera tickets. In Europe, public subsidies and box office revenues originate from totally different actors: on the one hand, public entities provide subsidies; on the other hand, individual spectators buy tickets. History teaches us that American opera houses are created and supported by individuals. American opera houses do not spring from cities, individual states or the federal government. The communities that surround American opera houses thus feel a pride of “ownership” that derives from this reality.

Variable combinations of box office revenues, public funds and donations: a European in-between model

These combinations bring us back to Europe, and in some cases to Canada. This model includes opera houses with a comparable financial structure: various proportions of public subsidies (up to 55 per cent at the Opéra National de Paris, 50 per cent at the Liceu and at the Teatro Real in Madrid, 30 per cent at Covent Garden), earned income from 25 per cent to 45 per cent of the total, and private grants, which make up between 10 per cent and 30 per cent of the total. In spite of the differences among the houses grouped into this model, none of these funding sources is marginal. This model holds sway in fewer than 20 opera houses, all situated in large cities and regional or national capitals of Europe. They include Covent Garden in London, the Opéra National de Paris, the Liceu in Barcelona, the Teatro Real in Madrid, La Scala in Milan, the Zürich Opera, the Vienna Staatsoper and the Munich Staatsoper. These capitals and their hinterlands are wealthy. The number and size of individual fortunes and powerful firms located in their areas cast light on the importance of private contributed income. As opposed to the American model, private contributions come from companies or foundations more often than from individuals, except in the case of Covent Garden. The tax systems of the UK, Spain, France and Switzerland allow both individuals and companies that donate money to cultural or social organizations to deduct it partially from taxes.

These houses do benefit from both higher earned income than the average in Europe and from private grants and contributions. Public subsidies, however, remain crucial. Without them these houses could not sustain their artistic level and the number of opera performances they produce; their very survival would be in question. There are several ways to look at the funding situation of these houses. One is to focus on the growing importance of their earned income and private contributions. Another is to admit that they still need significant subsidies. Yet a third way is to note that the balance among these various funding sources has improved in recent years.

2. Key features of the three funding models

Now that we have surveyed the relative weight of each of these three prominent sources of income for opera houses, let us consider first their differences as far as earned resources and particularly box office revenues are concerned, then the imperfect comparability between public subsidies in Europe and private contributed income in the USA, and finally some differences between the cost structures in opera houses on both sides of the Atlantic.

Compared box office and other earned income

The share of the budget composed of box office receipts varies in importance from decisive to marginal.

From one house to another, the differences appear as a percentage of their total operational expenses each season or each year.

These differences reflect two visions of the *raison d'être* of opera houses. In Europe, high public subsidies and low box office revenues, as shown in Table 6.1, mean that opera houses are financially sustained because of their cultural and social value in the eyes of public entities. In the USA, cultural organizations owe their existence to powerful private initiatives which reveal commitments to the benefit of the art forms supported and strong individual involvements. In most European opera houses, box office revenues represent between 10 per cent and 20 per cent of operating expenses, versus 30 per cent and sometimes 50 per cent in American opera houses. One could argue forever about whether a link between cultural and public value in Europe explains the strong public funding of opera houses, and whether another link exists in the USA between private initiative and a higher level of box office revenues. The relative weight of box office revenues also depends on technical and financial parameters: the theatre's seating capacity,

Table 6.1 Opera houses' income in Europe and the USA

Types of financial structure (all data as % of total budget)	European model	American model	In-between European model
Ticket revenue from box office	8–20	36	20–30
Other earned revenues	2–4	16	5–15
All earned revenues	10–24	52	25–45
Public subsidies	76–90	Non-significant	30–55
Private grants and contributions	Non-significant	47	7–20
All contributed income public or private	76–90	48	55–75

average price of tickets, average occupancy rate and number of performances. As previously described, the average size of opera halls differs greatly between the USA and Europe: 2,400 seats in the USA and 1,200 seats in Europe. These figures give only an indication of the overall situation.

None of these parameters alone would be sufficient to differentiate the European and American models, but considered together, they do. The highest box office revenues in the USA are to be found in opera houses enjoying the same situation as houses that belong to the European in-between model: a location in large and wealthy population areas; availability of large auditoriums; and lack sometimes of strong competition. Let us consider some of the larger US and European cities and then smaller ones.

Large box office revenues can be observed in the largest cities. The Greater New York area has a population of 21 million inhabitants and the Metropolitan Opera auditorium holds up to 4,000. The Metropolitan and the New York City Operas are genteel rivals, each with its own distinctive repertoire policy. In Chicago, the Lyric Opera's Ardis Krainik Theater can accommodate 3,563 spectators; the population of the city itself is 2.8 million, and the Chicago area is home to 9.2 million. The Chicago Opera Theater supplies some modest competition, with a distinctive programming blend. In these cities, the huge size of auditoriums may have been driven both by large potential markets and by the need to derive vital revenue from the box office. The relevant adjustment to the markets of these opera houses comes with the number of performances. As we see in Tables 6.2 and 6.3, the largest American opera houses or companies attract audiences that are often bigger – much

Table 6.2 Opera attendance and budgets in six large opera houses

Opera house 2006–07	New York Metropolitan	Staats Opera Vienna	<i>Opéra National de Paris</i>	Staats Oper Munich	Covent Garden London	Lyric Opera Chicago
Attendance	826,000	481,264	394,765	323,121	289,000	279,472
Box office in operational budgets %	38 opera only	30.5 all artistic activities	25.3 all artistic activities	30.9 all artistic activities	39.4 all artistic activities	50 opera only
All earned income %	50	45.3	37.95	31	51.75	66
Number of opera performances	223	230	178	159	168	82

Table 6.3 Opera attendance and budgets in five medium-/small-sized houses

Opera house 2006–07	Nederlandse Opera Amsterdam	Welsh National Opera Cardiff	Monnaie Brussels	Sant Fe Opera Festival	Grand Théâtre Geneva	Lyon Opera
Attendance	148,900	125,000	91,000	82,289	75,825	43,560
Box office in operational budgets %	23.7	22	13.32	33	20.25	8.31
All earned income %	29.4	24.6	211	49	27.1	12.3
Number of opera performances	109	107 out of which 73 in touring	100	38	64	96 out of which 23 in touring

bigger in the case of the Metropolitan – than those of their European counterparts, but with a significantly smaller number of performances. The Vienna Staatsoper's audience is 58 per cent of the Metropolitan's with roughly the same number of performances.

The same patterns prevail in Europe: reasonably large halls in wealthy cities, as the *Opéra National de Paris* (1,950 at *Opéra Garnier*, 2,710 at *Opéra Bastille*), at the Munich Staatsoper (2,101, of which 328 are standing), in London (2,253 at Covent Garden) and the Staatsoper in Wien (2,276, of which 567 are standing). In London, Paris, Munich

and Vienna, some competition exists with other opera houses: English National Opera in London, Théâtre des Champs Elysées, Théâtre du Chatelet, Opéra Comique in Paris, Volksoper and Theater an der Wien in Vienna. There are several explanations for the high proportion of the total budget covered by box office revenue in the larger houses, both American and European. All of them maintain a high occupancy rate. They adapt their repertoire choices and invite famous artists. The average ticket prices can then reach high levels, as shown on Tables 4.1 and 4.2. Because each percentage point of box office revenues translates into hundreds of thousands of dollars or euros, the price rise is significant. When box office revenues exceed 20 per cent of the total income of the house, managers are more willing to rely on the box office for a larger slice of the overall funding. The developments of recent years demonstrate this.

Though, most European opera houses have lower box office revenues, for reasons that have been explained. Especially in Germany, there are more opera houses, with smaller halls and more performances. Average occupancy rates are lower than in larger auditoriums, and ticket prices remain at a lower average level because affordability is a high priority.

Two noteworthy European opera houses, Glyndebourne and Baden-Baden, occupy a spot close to the American model. Glyndebourne in the south of England attracted 85,000 spectators in 2009, offered 75 performances and received no public subsidy for its festival activity.¹ Its box office brings Glyndebourne 66 per cent of its income. In view of its budget of £20 million and its audience, if Glyndebourne were in the USA, it would rank among the 14 largest American houses. Baden-Baden's opera performances – four titles and 20 performances a year, totalling 40,000 spectators – are only part of this theatre's overall activities. Baden-Baden is a very specific case in Germany, as it receives no public subsidy, is located in one of the wealthiest German cities and benefits from one of the three biggest German auditoriums (2,000), along with the Munich Staatsoper and the Bayreuth Festspielhaus.

The box office revenues from artistic activities other than operas, as well as the commercial income generated by a great variety of non-artistic activities, may account for some differences between opera houses in earned income. For the 2007–08 season, the Opéra National de Paris earned €29.9 million from the opera box office and €17 million from the ballet. This adds up to €46.9 million, or 65 per cent of the total earned income of the Opéra National de Paris that season. At Covent Garden, the ballet brings in the same share of the box office as at the Opéra National de Paris. At the Scala, the ballet share is 27 per cent

of the opera box office, that is, €3.7 million versus €13.7 million for opera. In Germany and Austria, the array of productions often extends to operettas and musicals, as at the Gartnerplatz in Munich or at the Volksoper in Vienna and indeed in many other Musiktheater. Concerts also make up a significant part of the overall activities of opera houses in some cases, such as the Semperoper in Dresden, the Berlin Staatsoper and the Stuttgart Staatsoper. However, the impact of these various artistic activities, aside from opera productions and performances, cannot by itself explain the major differences in box office revenue between European and American opera houses.

The sources of income generated by an opera house range even further. One must include the sale of programmes (in Europe), the revenues from bars and sometimes restaurants, and the organization of social events with special fund-raising goals (galas among others). Although situations vary considerably, it is fair to say that average earned income in European opera houses ranges from 10 per cent to 45 per cent of total income versus 50 per cent in American opera houses.

Imperfect comparability between public subsidies in Europe and private grants and donations in the United States

Public subsidies do more to fund opera houses in Europe than private contributed income does in the USA. As seen in Table 6.1, public subsidies represent between 76 per cent and 90 per cent of the income of European opera houses, while private contributions – mostly grants and donations – correspond to a little less than 50 per cent of the income of American houses. Public subsidies represent only 2 per cent of all American opera houses' total income, though it may reach 4–6 per cent for the smaller houses. To date, nothing indicates that public subsidies are likely to provide significant additional funds to American opera houses. In Europe, we see a move towards the encouragement of donations, through recent developments in fiscal policies in various countries. A question remains: how to categorize in legal and fiscal terms the donations and other contributions of individuals and firms to not-for-profit organizations such as opera houses. Is it private or partly public money? Such donations always benefit from tax deductions. Deductibility levels depend on fiscal rules and on gross fiscal revenues. The level can, for instance, go up to 50 per cent of the claimer's adjusted gross income (USA). Would the same amount of money go to opera houses if part of this money were not deductible? Marc A. Scorca gives the American answer: "Government support for the arts is minimal, and

in the absence of funding from a central taxing authority, opera companies must instead rely on people's willingness to tax themselves by making contributions to the organizations they value."²

Here come the very motivations of individual contributors and the policy concerns of public entities when they decide to fund cultural organizations such as opera houses. Public subsidies bring us into the typically European world that calls for regional or local political authorities and sometimes central state administrations to support cultural organizations when, Marc A. Scorca reminds, "American opera companies – indeed, all American cultural institutions – depend on the continuing engagement of community stakeholders".³ Community stakeholders in the American opera houses and companies, and elected representatives and civil servants most often in the European ones will play a major role in the decision-making process.

Globalization of public funding in Europe

Apart from a very few exceptions such as Glyndebourne, no major European opera house could get by without public financial support. Opera houses sometimes depend on a single source of public funding, sometimes on several.

Usually, because opera houses have long belonged to a city or township and still do, local or regional public authorities fund them. In France, several houses are supported solely by the municipalities where they are located. In Germany, Musiktheater are funded sometimes by a single city, sometimes by a group of cities, sometimes by a Länd, sometimes by a city together with a Länd. The city of Stuttgart and the Länd of Baden-Württemberg finance orchestras, theatres, operas, ballets and various forms of musical activities in the Stuttgart Staatstheater. In contrast to Germany, some national governments directly subsidize several opera houses: the French government, for example, provides the entire public subsidy to the Opéra National de Paris and to the Opéra Comique.

Similar situations can be observed in Amsterdam, between the Dutch state administration and the Nederlandse Opera; in Brussels, between the Belgian state administration and the Théâtre de la Monnaie; in Vienna, between the Austrian state administration and all of the city's opera houses. In Erfurt, the city and the Länd together fund the Theater Erfurt with €12.7 million, or 71 per cent of its total budget (€17.2 million). In Dresden, as in Munich, in contrast, the Länder fund the Semperoper, or the Bayerischer Staatsoper. The Länd of Saxony provides €33.7 million to Semperoper, 53 per cent of a budget of €63.7 million in 2007–08. During this same period, the Länd of Bayern supplied

€46 million to the Bayerischer Staatsoper, or 56 per cent of a budget of €82.2 million. In Switzerland, the city of Geneva provides the Grand Théâtre close to €25 million in various forms, or 68.7 per cent of its budget.

Other European opera houses benefit from public subsidies provided not just by one, but by several local and sometimes national public organizations. In France, five opera houses located in the régions, which were originally supported only by their cities, have received over the past 10 years a “national” label.⁴ The label roughly means the recognition by the national government of an artistic activity of national interest, a regional attraction that is involved in training artists and outreach programmes. This justifies the central state subsidies added to the existing funding by the local public authorities (cities, “regions” and “departments”). Multi-annual commitments bind these public organizations to one another. In 2010, between 14 per cent and 20 per cent of the total public funds granted to these “national” French opera houses came from the central state administration. The proportion reaches 30 per cent at the Opéra National du Rhin, financed by the three cities of Strasbourg, Mulhouse and Colmar since the beginning of the 1960s. In Spain, the opera houses of Madrid (Teatro Real) and Barcelona (Liceu) are managed by public foundations and benefit from similar mechanisms: funds provided by the Spanish national administration and subsidies from several local or regional authorities. As depicted in the Table 6.4, public subsidies vary from 40 per cent to 80 per cent of the entire income of the houses.

The UK has its own traditions. Neither the cities nor the national administration directly fund cultural organizations or activities. The Art Council of England, Wales and Scotland is a group of public agencies independent from the state administration. They have their own budgets, and can use part of the income generated by the National Lottery. Arts Council England (ACE) defines its own policy, objectives and criteria for funding cultural institutions. ACE and some UK opera houses agree on multi-year commitments (see Table 6.5).

In European opera houses, multi-year agreements signed with those public organizations providing public subsidies are becoming more and more common. Such agreements exist in houses as varied as Covent Garden, the Opéra National de Paris, the Liceu in Barcelona, Madrid’s Teatro Real, Turin’s Teatro Regio and the five French “national” opera houses in different cities. Most of these agreements specify the number of productions and performances to take place every year, the number of new productions and revivals, touring activities, the anticipated

Table 6.4 Origins of public subsidies in five European houses

	Teatro Real Madrid	Liceu Barcelona	Scala Milano	Grand Théâtre Geneva	Opera de Lyon	Opera du Rhin
Total income 2007–08 (m €)	53.5	57.2	120	36.5	34.9	25
% of public subsidies in income	48.4	50.5	40.1	68.7	80.5	77
Share of different public organizations (% of total)						
Ministries of culture	67.8	48.4	74	–	19.3	24.7
Provinces/regions	–	36.4	11.3	–	21.1	6.8
Main city	7	10	14.6	97	58.3	45.8
Group of cities	25	–	–	2.9	–	10.3

Table 6.5 Subsidies awarded to three UK opera houses in 2008

UK Opera house	Covent Garden London	Welsh National Opera Cardiff	Opera North Leeds
Total opera income (m €)	117.3 (Rate: £ = 1.37€)	22.3	15.9
% of subsidies	30.6	64.65	71.7

number of spectators, as well as the anticipated revenues including the box office. Public subsidies are considered globally, while the goals prove to be multiple and varied. The agreement also defines a number of missions and objectives such as broadcasting policy and the training of young artists. However, public entities in Europe do not really like being held to multi-year agreements, especially in crisis periods such as the one existing today. In the United Kingdom, the agreements between ACE and opera houses mention that they are not automatically due to be renewed. On the same issue, most similar agreements in Europe are mute. The subsidies projected for all subsequent years always remain filled with uncertainty. In Europe, the public budgetary truth is most often annual. The world financial crisis strengthens this reality.

Fragmentation of grants and donations in American opera houses

In the USA, donations by individual benefactors, trusts and private family foundations are the main sources of opera houses' contributed income and represent on average 50 per cent of the operating budgets of American opera houses. This is why their effect is so decisive and fund-raising efforts so important as the houses compete against other charitable organizations in the spheres of education, health care and social work. Similar grants and donations also help support some European opera houses, but to a lesser extent. While decisions to provide public subsidies to European opera houses are made by a few people in public entities, the decision process with American donations is, on the contrary, extremely fragmented. It results from the sum of a large number of individuals as opposed to public decisions to give money to chosen charitable organizations. Endowments often buttress the funding process as opera houses try not only to expand their funding but also to secure it for the long term.

Donations and endowments: mechanisms and figures

In the USA, mechanisms need to be emphasized because they both introduce time horizons beyond fiscal years or opera seasons, and they also permit in-depth discussions between donors and opera house managers on choosing the activities that may benefit from contributions. Donations are considered as restricted funds each time the donors require the funds to be used for a defined target or purpose. Time horizons of donations are first linked to the accounting difference between contributed unrestricted income and contributed income released from restrictions. "Temporarily restricted" donations can be viewed as agreements between the donors and the receiving non-profit organizations. The use of donations also can be left to the house's own discretion or be restricted. Such donations, also called "restricted funds", require the funds to be used in a specific way or for a specific purpose.

In 2006–07, the total unrestricted contributions received by the 97 American opera houses and companies that are members of *Opera America* amounted to half of their operating expenses. This share was split in two parts: 40 per cent of operating expenses was indeed supplied by unrestricted contributions, and 10 per cent came from contributed income released from restrictions. Some opera houses, such as the Dallas Opera, the Utah Symphony and Opera, and the New York City Opera, had an even higher ratio of unrestricted contributions in their budgets in 2006–07. Interestingly enough, if the ratio of 50 per cent is

an average, it is also noticeable that the smaller the houses or companies, the higher the ratio of contributed versus earned income of individual grants versus box office revenues. On average, in the 2006–07 season, 58 American opera houses and companies whose budgets ranged from \$100,000 to \$3.2 million got 60 per cent of their income from contributions.

Donations also exist in Europe, but with a few exceptions, they do not have the same strategic importance as they do for American opera houses. The UK is well ahead in Europe in terms of tax deductibility. Donations to charity in the UK, whether given directly or channelled through foundations, have been tax-deductible expenses for a long time.⁵ Most prominent opera houses in the UK qualify as charitable organizations. Between 2006 and 2008, 17–20 per cent of the annual income of Covent Garden came from donations and similar sources, totalling approximately £16 million out of an average operating budget of £90.4 million during that same period. The ratio was 27.5 per cent in Glyndebourne, which represented £5.4 million out of a budget of £19.6 million in 2007.

Some European fiscal laws have recently moved towards increasing tax deductibility without, however, allowing deductibility when inheritance as in the US and in UK. A number of opera houses have already taken advantage of this trend by developing fund-raising activities when allowed by their tax status, or indirectly so with the assistance of organizations authorized to do it. This supplies 13.4 per cent of the operating budget at Barcelona's Liceu, 13.2 per cent at Madrid's Real and 7 per cent at the Opéra National de Paris. This latter amount equals half of that of all other French opera houses combined.⁶ As yet, fewer than 15 European opera houses receive enough in donations to account for more than 5 per cent of their resources.

One main concern of the managers and supporters of American opera houses – trustees and major donors, as well as key executives – is to perpetuate and secure for the future private grants and contributions. A similar preoccupation exists in those European opera houses that receive a significant amount of private contributed income. Endowments solve part of this issue in the United States and in the United Kingdom. The endowed assets are kept intact; only the income generated may be used. The mechanisms are familiar: various donated capital assets are invested and generate revenue. A fraction of this revenue funds the operating budget of the opera house. The rule of thumb: an endowment should equal three times the annual operating budget in safe economic situations.

A large majority of American opera houses benefits from endowments, whose size varies greatly. These are most often invested in the stock market. Economic crises obviously affect an opera house's endowment, cash flow and revenue stream. During such periods, the value of the invested capital decreases and so does the interest it produces. Interest can be used as income for the operating budget only if the investment still holds at least its initial value. To use more than the allowed percentage of revenue generated by an endowment, as defined by the fiscal authorities, requires the authorization of a judge.

Sometimes donors will increase their gifts for the sake of the opera house they want to support precisely when the endowment value drops. In November 2008, the endowment of the Lyric Opera in Chicago equalled \$113 million. In January 2010, it stood at roughly \$140 million, even though the Lyric's assets suffered a loss of \$39 million in 2009.⁷ The Metropolitan's endowment reached \$300 million some years ago. By the end of 2009, it had dropped by one third. In December 2003, the endowment of the New York City Opera equalled \$57 million. Today, after the cumulative effects of the recent economic crises, it is no larger than \$17 million. At Covent Garden, the endowment reached £17 million in the fiscal year that ended in April 2008. In 2009, the view at *Opera America* was that the endowments set up before 2000 weathered the economic crisis better than the more recent ones.

The donors

Individual donors are dominant in American opera houses, as they provide more than 60 per cent of all contributed income and more than 30 per cent of the houses' total income. The number of donors at each American opera house varies widely. The total number of donors exceeds 65,000 at the Metropolitan in New York, and approaches 10,000 at the Lyric in Chicago. As one might expect, a small number of them provide a high percentage of the amount of individual contributed income.⁸ At the Metropolitan Opera, 11 donors in 2007 provided the equivalent of 26 per cent of the donations; at the Lyric Opera, less than 10 per cent of the donors contributed 90 per cent of the \$19.8 million received by the house in 2007.⁹ All in all, about 50 industrial, commercial and financial firms, and 130 individual donors (or foundations and family trusts), fund the Lyric Opera of Chicago to the tune of more than \$10 million a year. At the Metropolitan Opera, contributions of a million dollars or more, whether split into several payments or in one big chunk, are frequent.

American donors take pride in their philanthropy and enjoy flaunting it publicly. Some of them like to attach their names to the opera house they sustain, achieving some measure of social or cultural immortality. The houses' general managers have to understand their donors' motivations, promote the image of the house and the financial needs of their artistic projects, and, when necessary, convince donors either to strip the restrictions from a donation or to modify the original conditions.

Those donors who provide the largest financial contributions often join the board of trustees, which is liable for the financial consequences of the opera house's activities, under a doctrine of collective responsibility. Those donors must be convinced by the vision and projects of their general manager. The four American opera house general managers we met while preparing this book acknowledge that they spend more than half their time with the house's donors. This may seem excessive, but it also serves to strengthen the donors' involvement in the health of the house. All American brochures and programmes mention the donors' names and classify them according to the size of their gifts. In the USA, this practice exists in all cultural institutions. In European brochures, one would find the donors' names, whether individuals or corporate firms, but very rarely the amount of their contributions.

In the United States, contributed income from public foundations is not significant in terms of the total amount of the contributions received by the opera houses, which is minor, but this marginal financial dimension concentrates on supporting creativity and innovation in opera as an art form. The National Endowment for the Arts' total support was \$1.4 million in the fiscal year 2008, or less than 1 per cent of all income reported by American opera houses or companies. The Andrew Mellon Foundation's opera programme aims to provide funds to opera houses that are "consistently at the forefront of finding ways to improve the developmental process for creating, producing, revising, and reviving new operas; developing collaborative partnerships with their peers and with other community and cultural institutions; and exploring new uses of technology in opera production and in audience engagement".

What are the activities financed through private grants?

Donors may wish to make a financial contribution to a particular production or to particular parts of it. In all American opera houses, the needs for funding cover the whole of their activities, from opera production to the training of young singers, the development of activities intended for children, privileged access for people who cannot afford to

buy full-price tickets, staging and costumes, the renovation of an auditorium, the modernization of scenic devices and the development of the broadcasting capacity of the house and other.

Agnès Varis and Karl Leitchman belong to the shortlist of the 11 most important donors to the Metropolitan Opera of New York. In 2007, they contributed a total of \$10 million to be spent over several years. Two million dollars were dedicated to the financing of a “rush program ticket”! For every performance, 150 single tickets were purchased from the Metropolitan at a price of \$100 each and then sold to students at a price of \$20. In spring 2009, this programme was widened to include those 60 or older. Agnès Varis explained in the Metropolitan Playbill of *Lucia de Lammermoor* in September 2007: “Beverly Sills and I believe that music belongs to everybody and that you can’t put great opera, or any great music, in an economic class.... I felt that was a smart business. The Met had the idea.” She adds, “My job is to write the check; I’m not embarrassed to say that. I want to be involved because this represents everything that I believe in.”

In June 2009, Jane Lipton Cafritz became chairman of the board of trustees of the National Washington Opera, which she had joined in 2002. She gave her name to the training program of young artists to which she made a financial contribution to help with its creation. Thanks to her, the Domingo-Cafritz Young Artist Program was born. At the Opera Theater of St Louis (OTSL), a similar programme called *Gerdine Young Artists* carries the name of its benefactors, Leigh and Alice Gerdine, founder members of the OTSL who wanted to help train young talented singers.

Let us go into more depth with these examples, as they illuminate the interaction between peoples’ motivations, art and financing the art. American opera amateurs have a pronounced taste for great voices; the American philanthropic tradition has always given centre stage to donations intended for training and education. The managers of American opera houses have long known how to integrate training centres and internship structures with their organizations, nurturing young singers who are gradually offered more and more demanding roles. Most of the world-famous American singers, such as Renée Fleming, Susan Graham and Joyce Di Donato, have been trained in these centres. These training programmes are the lifeblood of opera in the USA.

The donation process is similar in European houses when such donations exist. At Covent Garden, a £10 million donation provided in 2006/07 by the Paul Hamlyn Foundation permitted the creation of an educational programme funded through the Royal Opera House’s

endowment revenue. The famous Floral Hall of Covent Garden now bears the name of Paul Hamlyn Hall. At the Palais Garnier in Paris, a lounge is named for Florence Gould, an American sponsor of the *Opéra National de Paris* Ballet company.

Globalization has affected sponsorship. Flavia Gale, an American citizen of British and Austrian origins, discovered musical sponsorship at Glyndebourne, before becoming vice director of development at Covent Garden. Today she contributes financially to the programme “Ten months of school and opera” of the *Opéra National de Paris*, intended for schoolchildren from underprivileged areas near Paris. “In a context of crisis such as the one we’re currently going through,” Flavia Gale says, “we can’t ask the governments to support the arts before thinking about economic and social infrastructures. It is up to those who enjoy financial abundance to care for the arts and take responsibility.”¹⁰ A fascinating and perhaps premonitory interplay between historical American cultural currents and the old French tradition that still calls for public funding of the arts!

One might imagine that cultural policies or objectives such as outreach or the creation of new operatic works can be realized only if public policies and subsidies support them. The reality is different. When looking at the diversity of the motivations and objectives linked to private grants and donations, it clearly appears that individuals who fund opera houses often pursue cultural or social goals just as specific as those targeted by public subsidies in Europe.

Strong links exist between public subsidies and cost structures in European opera houses

In European opera houses, tight correlations exist between public subsidies and the fixed costs of opera houses. While subsidies cover 80 per cent of opera houses’ annual operating expenses, they of course cover all of their total fixed costs, and the greater part of their variable costs, artistic and other.

When earned resources carry a higher proportion of the budget versus public subsidies, the link between public contributed income and fixed costs remains important. In American opera houses, the difference between fixed and variable costs does not have the same significance as in the European ones, except perhaps for New York’s Metropolitan Opera and the New York City Opera. The reasons include in the contrast in the sheer quantity of productions, in the inherent differences between the stagione and the repertory systems of organization,

whatever the modifications in both. Large artistic activity volumes all over the year call for higher proportions of fixed costs. Let us consider the case of a European opera house producing up to 300 operas, choreographic works or concerts in a year, as many of them do in Germany and some others in the rest of Europe. This may mean rhythms of activity on the main stage and in the main auditorium up to 300 times a year. Artistic, technical and administrative teams have to be present all year long. Musicians, members of the choir and sometimes the members of the ballet are permanently employed and paid year-round. The corresponding expenses are part of what is called fixed costs, and they most often amount to 65–75 per cent of the total operating expenses. Even if the same percentage of personnel-related costs exists in American opera houses, many personnel costs are not permanent year-round. Seasons are shorter in American opera houses than in European ones, the number of performances smaller, the auditoriums larger.

In certain European countries, ideological ties bind together public subsidies and fixed costs. The French traditional concept of the *théâtre en ordre de marche*, which can be literally translated as “theatre ready to produce and perform”, is a good illustration of this. The opera house is said to be *en ordre de marche* when its fixed costs, that is, indispensable operating expenses, are funded by a public subsidy before any production or performance takes place on the stage. The theatre is just ready to operate. All maintenance costs are paid. Management team and administrative staff, orchestra, choruses, stagehands and all workshop technicians are present, employed and paid by the theatre, thanks to the existing subsidy, but variable costs are not supposed to be covered by the subsidy. When the moment comes, all or part of the variable costs will be covered by the earned income. The way the concept is used indeed foresees that the volume and the periodicity of artistic activities are clearly correlated to the number of artists, technicians and other categories of personnel involved. The paradox is that the *théâtre en état de marche* is supposed to leave out all artistic expenses specifically attached to a production, which of course is nonsense. When, on the other hand, the opera house’s earned income rises as high as 20 per cent or more of its total income, the concept traditionally entails several consequences. If the amount of public subsidy corresponds to the full cost of salaries, it is assumed that the contributed subsidy aims to maintain permanent artistic, technical and administrative staff, and possibly to guarantee employment. Opera house managers and union representatives refer to such a link when ensuring that subsidies will always cover permanently employed staff.

However this concept has lost a part of its doctrinal strength. Thus, at the Opéra National de Paris and at La Scala in Milan, where the tie between public subsidies and fixed costs used to be very strong, fixed costs are now growing faster than public subsidies and exceeding them, meaning that a fraction of fixed costs will henceforth be covered by the house's earned income. A similar disjunction between fixed costs and subsidies can be observed in a number of European opera houses.

The German situation as described by Professor Gerd Uecker is very similar. "The salaries of the permanent staff are the most important budget item in the expense column of an institution of the like of an opera house and generally represent 80–90 per cent of the total budget expenditures.

These costs related to staff salaries are bound to legal agreements that are negotiated, most of the time, between the employers, or the administrators, and unions (*Arbeitnehmervertretungen*). Inhibitive and complicated situations linked to the efficiency of the institution often result from the fact that a variety of labor unions is present within one house. The opera house's personnel are – permanently – represented by distinctive labor-union delegations, depending on their status or field of work; several permanent labor unions represent the actively engaged soloists, the chorus members and the musicians. The differences seen in terms of salary agreements between the federal state (*Bund*), the provinces (*Ländern*) and the municipalities (*Kommunen*) are related to these negotiations.

There is regrettably no homogeneous and fundamental ruling about that, if the administration has to equalize the negotiated increases in salaries with the increased subsidies granted to the theatre. This situation will make it exceedingly difficult for opera houses to maintain, in the long run, the artistic level that is expected of them, since they are constrained to take from their already small artistic budget what is needed to equalize the salary increases. Opera houses are more and more forced to accept collective agreements that do not meet the legal closings."¹¹

The *état de marche* concept has much less significance in the European opera houses where subsidies do not exceed 30 per cent of the operating expenses (Covent Garden) or 50 per cent (Liceu, Teatro Real in Madrid). Covent Garden maintains very cautiously controlled fixed costs. The Liceu outsources a significant part of its production expenses, which also limits its fixed cost structure. While the European rationale of covering the fixed costs of an opera house with stable and reliable public sources seems sound, it can bring about rather perverse effects. Let us consider

the following theoretical and absurd situation: an opera house obeying this logic that did not perform any opera, kept the curtain down all year long, would balance its budget with zero variable expenses and zero income, with fixed costs entirely covered by subsidies. Paradoxically, one could then see public support create a situation that favours the melting away of activities.

This is, of course, a caricature. But it is also an invitation to consider the existing relationship in European opera houses between their fixed costs and their overall activities, between the personnel they employ all year long and the number of their opera productions and performances. We reviewed the case of the Opéra National de Paris in a previous book, and concluded that this house could technically if required offer more performances than it does today (Agid and Tarondeau, 2006, pp. 258–62). To permit such a situation, public funds should ideally be accompanied by tougher conditions than they have been until now, demanding commitments on the volume of activity, while keeping proper standards in terms of quality. All in all, the *état de marche* concept contributes to increased fixed costs that neither the volume of activity nor the Baumol effect can justify. The permanent staff shows up in the fixed costs column, while temporary or invited staff members are categorized as variable costs. Obviously, the permanent staff participate in the creative process and production: costumes and props, sets, lighting design, performances. Costs related to the technical staff, the musicians, the dancers and the choir should be allocated to the cost of each of the operatic or choreographic works, and would be considered as such in a full cost accounting system. Without a full cost accounting system, variable costs are inevitably underestimated and the costs of the *theatre en état de marche*, or fixed costs, overestimated. Can Machiavellianism be detected in this approach? Might there be a willingness to overestimate the house's fixed costs in order to negotiate more effectively the amount of public subsidies to be obtained? Apart from comparative studies, it would be advisable to estimate real fixed costs by analysing as far as possible the necessary and sufficient income a house needs to preserve its human and knowledge assets. The idea would be to analyse the differences between those who guarantee a given volume of production and those who vary.

The same *en état de marche* concept is also used to support the need to preserve the craftsmanship upon which opera relies as far as sets, costumes, props, wigs and sometimes shoes are concerned. Some European opera house general managers, from Bernard Focroulle to Hughes Gall, insist on such a necessity. This is where the concept

meets the employment dimension. Such a shortcut may be a source of rigidity because it potentially leads to the purposeful integration of all the artistic trades pertaining to the performing arts. Not all opera house managers are willing to resort to the marketplace to acquire the necessary products or services, which might be cheaper or higher in quality. They refuse to abandon a trade, wig making, for example, and do not want to see variable costs increase, as this could possibly lead to a decrease of public subsidies. This rationale, strengthened by a long historical tradition, leads to the maintenance of a strong integration of know-how in opera houses through the permanent employment of artists and technicians said to be indispensable to a proper level of overall artistic activity. In this respect, attitudes and policies differ from house to house, and partly depend on the activity levels. While houses such as the New York Metropolitan, the Opéra National de Paris or La Scala of Milan do integrate a large variety of know-how and crafts, the Liceu does not automatically do so. The different levels of activity may be only part of the explanation.

When the operating budget of an opera house is largely supported by public subsidies, its final budget can be fixed as soon as the public subsidies have been confirmed. The box office revenues can generally be evaluated at a correct level, except in the case of unpredictable accidents or crisis. Once the operating budget's total income column has been defined, the money is distributed towards designated activities and purposes. Because public subsidies are most often global, negotiations between public organizations providing the money and opera house management involve a small number of people. They take a global character, even if they refer to specific objectives. Agreements or conventions between funding bodies and opera houses do not always remove uncertainty about the public authorities' ability to pay, especially when difficult times occur in public spending.

The links among funds, activities and costs in American opera houses

The classification of costs differs in American opera houses. The European distinction between fixed costs and variable costs, dominated by the link between fixed costs and public subsidies, does not have the same quasi political meaning as in Europe. There are costs equivalent to the European fixed costs, including the costs of a permanent staff, as the biggest American houses have permanent administrative, artistic and technical teams. Comparisons between personnel and non-personnel costs might sometimes lead to similar situations. Compared with

European opera houses, however, the borderlines between permanent and temporary employment differ for reasons already explained. The volume of operatic activities and seasonal length are generally lower than those of the European houses. Lower numbers of productions and performances as well as shorter seasons require fewer permanent staff members. As opposed to most European opera houses, American opera houses dedicate themselves almost exclusively to producing and performing operas and do not always possess their own theatres. For instance, the Opera Theater of St Louis hires the theatre of St Louis University less than 4 months a year. The Houston Grand Opera is part of a separate organization that runs the Miller Memorial Theater. Permanent staff, activities and attendance in some American and German houses are compared in Table 6.6.

In 2007, the 13 largest American opera houses – the Metropolitan Opera in New York excluded – offered on average fewer than 52 performances a year on their main stage. The 25 next most important houses, in terms of budgets and activities, offered on average 22 performances a year. The Metropolitan, with its 223 opera performances of 26 productions, is an exception in the American opera landscape.

During the same year, in the group of the 13 largest American opera houses, the Santa Fe Opera Festival offered 38 performances and 5 productions; the Lyric, 82 performances and 8 productions. The level of activity of these two houses differs in proportions which vary from one to two in terms of number of performances and productions. Both houses permanently employ throughout the year some engineers, stagehands and artisans, because they consider it necessary to maintain skills and activities year-round. The Lyric Opera in Chicago has 87 permanent staff members. At the height of the season, the number of staff can rise to 1000. No American opera house, in contrast to German opera houses, has its orchestra paid on a yearly basis, except the Metropolitan in New York. The most active houses, including the San Francisco Opera, the Houston Grand Opera and the Lyric Opera in Chicago, sign 20–26 weeks per year contracts with either orchestras or musicians. The Lyric Opera of Chicago shifted from 26 weeks in 2010 to 24 for 2011 and 2012. The Opera Theater of St Louis has a contract with the St Louis Symphony Orchestra for virtually all of its 28 annual performances, for 2 months every year. The Santa Fe Opera Festival, like the Bayreuth Festival in Germany, hires, year after year, the same musicians: they come from all over the USA to form the festival orchestra. Renewal gradually occurs and the number of musicians is higher in

Table 6.6 Permanent staff, activities and attendance in American and German opera houses

Opera house 2006–07	Houston	Santa Fe	Chicago	Erfurt	Essen	Dresden
Permanent staff (employment and all year long salaries)						
Total	120	70	87	314	621	787
Musicians	–	–	–	40	100	147
Choruses	–	–	–	40	50	95
Singers	–	–	–	17	25	32
Temporary staff	Up to 550 Given the seasons	Up to 400 Given the seasons	Up to 1000 Given the seasons	40/50 As an average	40/50 As an average	Variable given the seasons
Volume of artistic activities (all on the main stage)						
Opera performances	46	38	82	81	118	176
Ballets	–Activities other than opera managed by other organizations			25	42	60
Operettas				25	12	–
Concerts				22	–	34
	–					
	–					
	–					
Seasonality and attendance						
Seasonality (month per year)	8	4	8	10	10	10
Opera house attendance (opera only)	75,049	82,289	279,472	51,400	111,337	211,086
Attendance (all activities)	184,000	88,000	360,162	164,206	175,088	347,000

Bayreuth than in Santa Fe, due to the requirements of Wagner's operas. As observed by Marc Scorca, "opera companies in the United States have a unique level of flexibility to adjust to external factors. They have an economic advantage in their ability to make artistic choices that reduce costs. They have been doing for decades what major corporations discovered more recently – outsourcing. Opera companies have a level of flexibility that enables management to adjust, at least somewhat, to external conditions by hiring the people they need when they need them."¹²

Private and public funding: two different worlds

With or without detailed comparisons, a major difference between European opera houses' funding systems and the American's ones is noticeable. It is a question of public policies and public fundings in Europe. It is an addition of private ownership and initiatives in the USA. Of course, one can multiply qualifications and exceptions: deductible money is up to a point public money; private grants are developing in Europe; public financial involvement is not completely unknown in the USA, such as that of the city of Los Angeles to the benefit of the Los Angeles Opera in 2010. These interesting questions cannot mask a basic reality: in the USA, opera funding and destiny lie in the hands of private initiatives; in Europe, they remain the sum of public policies, city by city, Länd by Länd and sometimes country by country.

Such differences can immediately be viewed by comparing opera houses' economic indicators, for example, from the USA to Germany. *Opera America* uses three productivity ratios coherent with the main funding constraints of American opera houses and companies. A first one measures the ratio between all operational expenses and contributed income: development productivity is calculated by dividing all department expenses by total contributed revenue. Similarly, marketing productivity is calculated by dividing all department expenses by total box office revenue. And finally, programme coverage, the amount of core artistic expenses covered by box office revenue. In Germany with an equal coherence, ratios are defined with consideration to public subsidies and shares of expenses paid by the spectators.¹³ These ratios are: the average percentage of spectator contribution as opposed at the total cost of operations; the average amount of euros subsidized for each spectator; the average revenue brought by each spectator; the percentage of personal expenses in the whole operational costs.

Another difference exists between financial public transparency and availability of accounts. Without surprise, availability of data is high in the USA, weaker in Europe. The websites of many big American opera houses offer figures and audited financial statements. In Europe, such an attitude is scarce.

Cost pressures are different in nature in American versus European opera houses

On both continents, many opera house managers are very careful to control their costs as much as possible. But the environments differ. We believe that the quasi general European distinction between fixed and

variable costs does not exist the same way in American opera houses. When, in Europe, fixed costs accompany high activity levels, trimming those costs is extremely difficult. Fixed cost flexibility depends not only on working agreements that are partly national agreements, as in Germany, France and some other countries, but also on national labour laws, which differ from country to country. Whether the economic situation is difficult or not, or even a crisis, pressures differ on each side of the Atlantic. When an American opera house feels that it cannot sustain its box office expectations and notices some drop in contributions, it has to rapidly adjust its overall cost situation just to survive. This is the 2010 situation in most American opera houses, as described in the crisis chapter (Chapter 8). Except in Italy, no similar dramatic situation has existed in Europe. Though, some tough situations might appear in 2010 as in Spain or in the United Kingdom, as a consequence of global public policies due to reduce public deficits.

Vulnerabilities to funding are of a totally different nature by on both sides of the Atlantic. In the American opera houses, vulnerability is permanent, in quiet as well as in crises periods. Today's crisis makes things much tougher, but reactivity and flexibility are a must of the American model. In Europe, whatever the ups and downs, and without ignoring the tremendous improvements of the box office and of donations here and there, public subsidies remain the cement of the business models. This dependency on public subsidies at a time when reducing the public deficits appears today as a major potential vulnerability.

7

Governance, Organization and Management

In its 2007–08 Annual Review, the London Royal Opera House defines its governance and management major rules: “The direction and control of the Royal Opera house is determined by the board of trustees which meets at least seven times per year. The role of the board is to approve or monitor the strategy of the Royal Opera House and ensure that it is being effectively managed. The trustees are also responsible for the appointment of the chief executive, as well as the most senior positions. The chief executive, with the assistance of the executive team, manages the day-to-day operations of the Royal Opera House.”¹

Covent Garden is to our knowledge the first European opera house to publish its main governance and management rules. Opera houses follow defined or undefined public or private practices, depending on the house and country. In Europe, these practices are rarely known other than through the houses’ by-laws which are not always easy to either get or interpret. On the other hand, American opera houses abound in public documents and information useful for the understanding of their governance which includes organization and management issues.

Strong links exist between opera houses’ funding sources and their governance.

On either side of the Atlantic all governing bodies or authorities have in common the responsibility for the general managers’ recruitment and status.

Governance is shared between governing bodies and opera houses’ general managers. Governing bodies or authorities everywhere fulfil similar responsibilities, but their formats, responsibilities and influence differ.

Other powers exert an influence on governance.

A strong relationship exists between governance and opera houses' overall performances, both economic and artistic.

1. Links between opera houses' funding and governance

Three models emerge: the American opera houses correspond to the first model; the European opera houses to either the second or the third model.

As American opera houses are most exclusively funded from private sources with a domination of donations from individuals, the responsibilities of governance belong to their representatives. Every American opera house or company identifies itself to a sociological reality which differentiates it from most European houses. To qualify the nature of the American opera houses and companies, those who are familiar with them mention their "*ownership*", a term translated in French by "*property*" or "*possession*". The word ownership refers to an active relationship between the opera house and those who make its existence possible: the trustees. From the trustees stems the governance of American opera houses.

In Europe, two funding models coexist.

In most cases, public funding covers up to 80 per cent of European opera house budgets as we saw in the previous chapter. The choice of their general managers and the approval of their budgets belong to the public organizations that financially secure them: cities, Länder (Germany), régions (France), provinces (Italy) and sometimes national state administrations. The historic role played by these authorities in the cultural sphere remains dominant as far as opera houses are concerned. These centuries-long situations and traditions are inherited from the role at the time of the princely, royal or imperial courts.

In less than 20 European opera houses located in the European national or regional capitals, generally the wealthiest, sources of funding are more diversified. The share held by public subsidies weighs less in proportion to the budgets, even if their amount, in absolute value, can reach high levels. The share held by patronage can reach as high as 17 per cent of the annual budgets, as at Covent Garden or the Liceu, but public funding remains present, something that makes the difference between these houses and the American ones. Public and private funding balance each other better. The public organizations that fund the opera houses keep decisive responsibilities of governance, while sharing some or most of them with the existing boards of trustees whatever

the diversity of their denomination may be in the different European languages.

2. The opera houses' general managers' recruitment and status

The success of an opera house is largely connected to the successful choice of the one who secures its management: the American general manager, the English chief executive, the Dutch *Artistiek* and *Zakelijk*, the German or Austrian *Intendant*, *Staat intendant* or *General Intendant*, the Italian *Sovrintendente*, the Belgium or French *administrateur*, *directeur* or *directeur general* – all these words designate the leader of an opera house and refer to the one who stands at the heart of the house's governance, and is responsible for its management and almost always for its artistic activities (see the glossary). An opera general manager is chosen in concordance with their experience and personality, the hope that under their management the opera house will succeed and increase its notoriety. Plácido Domingo's artistic and overall visibility, the media coverage he gets all over the world, explains his presence at the head of the opera houses of Washington and Los Angeles. At the beginning of 1970s, Rolf Liebermann, called to the Opéra National de Paris was asked to solve an artistic and organizational crisis. Hughes Gall was also recruited to solve a crisis situation in the same house in 1995, as Michael Kayser and then Tony Hall in 2000 at Covent Garden, and as Stéphane Lissner at La Scala in 2005.

Their recruitment is a major governance responsibility, and a strong general managers' status is in the best cases a success factor for opera houses.

The recruitment of opera houses' general managers: a governance responsibility

On either side of the Atlantic all governing bodies or authorities have in common the responsibility for the general managers' recruitment and status. In the USA, the recruitment of the general manager of an opera house is only in the hands of its board. In Europe, whereas the houses' funding is secured by one or several public authorities to a maximum of 80 per cent, the same authorities are consequently responsible for their designation. Thus, in most of the German houses financed by cities or Länder, the mayor or cultural minister chooses the Intendant, who is the house's leader. When European opera houses profit from more diversified sources of funding, the houses' boards of directors, and the

associations or the foundations that administer them, are often given the statutory right to appoint their general manager. This recognition brings them closer to the American model but the final choice of the general manager has to be approved by the elected representatives of the public authorities that bring in the most important part of their funding, namely mayors, ministers and sometimes heads of state. Such is the case for the two large houses of Barcelona and Madrid, where the minister of culture has to approve the final choice of the general manager. At La Scala in Milan, the choice of the *Sovrintendente* requires the mayor's approval. At the Royal Opera House in London, the name of the person that the board of trustees plans to appoint as chief executive is communicated to the president of the Arts Council England. The Paris National Opera's directeur is chosen and appointed by a decision of the president of the republic.

Wide recruitment spheres

General manager's recruitment in opera houses is partly globalized, and has been so since the end of the 16th century. The first leaders of the Dresden and Opéra National de Paris houses were Italian, as was the first general manager of the New York Metropolitan, Giulio Gatti-Casazza, after he served as a *Sovrintendente* at La Scala. Since 1945, the American opera house environment has generated most of its current general managers. Still, the world of the opera houses shapes if not a village, a set of interconnected villages. Tim O'Leary, the present general manager of the Opera Theatre of Saint Louis, has had the opportunity to work closely with Gérard Mortier to supposedly manage the future of the New York City Opera. The mobility of opera houses' general managers is growing in Europe and sometimes from one side of the Atlantic to the other. Some German houses are or have recently been managed by non-Germans: the Munich's Bayerische Staatsoper by Sir Peter Jonas from England; the Theater Lubeck by Marc Adam from France; the Leipzig Opera by Henri Maier from France; the Theater Erfurt by Guy Montavon from Switzerland; the Nuremberg Staatsoper by Peter Theiler, also from Switzerland. Some French opera houses have or have recently had non-French leaders: the Opéra National de Lyon has been managed since 2003 by Serge Dorny from Belgium; the Opéra National du Rhin in Strasbourg by Guy Clémeur from Belgium; the Grand Théâtre de Genève by three French general managers over the past 30 years: Hugues Gall, Renée Auphan and Jean Marie Blanchard. Christoph Seufferlé was the Opéra National de Montpellier general manager from 2000 to 2006 before being appointed at the Berlin Deutsche Oper. Anthony Freud was

the Cardiff Welsh National Opera general manager from 1994 to 2005 before becoming in March 2006 the general director of the Houston Grand Opera. Globalization is not, however, the main rule. Local recruitment practices still stand out in the main geographical and linguistic regions of Europe and the USA.

Unevenly formalized and efficient recruitment processes

The formalized recruitment processes, that is, the set up of ad hoc committees, occasional appeals to specialized consultants, international invitations to tender and other, do not guarantee much by themselves. When a vacancy is announced, the opera world's villages, or the opera planet are quickly informed. The successful choice of a leader always goes through informed, rigorous and contradictory discussions between a candidate and those who hold the power to appoint him. The more difficult the situation of an opera house is for a newly appointed general manager, the higher the stake.

In the American houses, realism usually prevails. Trustees engage part of their personal fortune in the support of opera houses. It is in their interest to watch over the relevance of the recruitments they make or which are made on their behalf. They are never shielded from not sufficiently thought-out processes on either side. In 2000, the San Francisco Opera Association recruited Pamela Rosenberg to succeed Lotfi Mansouri, with the intention of transforming and modernizing the house. Neither the recruiters nor the candidate were able to or wanted to assess the reality of the house's financial situation and the possible consequences of transformed repertoire choices, although clearly announced by Pamela Rosenberg and wanted or accepted by the trustees.²

Conversely in 2004, David Gockley was about to take the lead of the San Francisco Opera Association and had to be replaced as the general director of the Houston Grand Opera. Last interviews with the final candidate took several days. Trustees in charge of the recruitment wanted to have the best possible understanding of the personality and skills of the person they were to recruit.³ The candidate, Anthony Freud, wanted to take the time to evaluate the exact situation of the house he would possibly lead and to understand his future trustee's spirit and will.

The formal recruitment processes remain less important than awareness with regards to what is at stake when recruiting a general manager, whether regarding artistic matters, financial management skills or team management. At Covent Garden in 2000, as at La Scala in 2005, the

choice of the recruiters has been guided by the clear necessity to improve governance, management and, above all, renewal of the houses.

Influence and power games are present everywhere in the recruitment of general managers. They are neither good nor bad in themselves. In Europe as in the US, the leaders of major professional associations are often consulted. Former leaders of opera houses, renowned all over the world, are also listened to. They express opinions, try to bring forth names and often succeed in these influence processes. On the edge of the visible side of governance, orchestras, particularly in Europe, can play a decisive role when it comes to influencing these processes. In 2008, the representatives of the Wiener Philharmoniker suggested Dominique Meyer⁴ to apply for the 2010 succession of Ioan Hollander at the Vienna Staatsoper. They supported his candidacy. The final positive decision was made by the Austrian minister of culture after she had had several discussions with Dominique Meyer.

General managers' origins

Many opera general managers come from the world of music. Karajan has certainly been one of the most illustrious conductors/general managers at the Salzburg Festival. From being a conductor he progressively went on to assembling and mastering all resources to produce recorded and live opera performances which remain masterpieces. Plácido Domingo, the tenor celebrated throughout the world, is not only the general manager of the two opera houses of Washington and Los Angeles. He also fills the auditoriums at the New York Metropolitan, at La Scala in Milan, at the Berlin Staatsoper, at the Liceu and elsewhere. Professor Gerd Uecker, Intendant of the Semperoper in Dresden, was originally a conductor. Daniel Barenboim's world reputation as a musician and his outstanding personality provide him with a tremendous amount of influence and power on the opera life in Berlin. The conductors Stefan Soltesz and Simone Young have been *Intendant* for the last 10 years and still are, the first in Essen, the other in Hamburg. Both still conduct the orchestras of their respective houses. Several opera houses' or companies' leaders began their professional life as musicians in orchestras, and often in so-called baroque orchestras: Jan Sutkowski in Poland, William Christie, Jean Claude Malgoire, Emmanuelle Haïm and many others in France. In the USA, John Crosby who created the Santa Fe Opera Festival was a musician and a student of Paul Hindemith.

Others come from the theatre. Götz Friedrich (1930–2000) and before him Wieland Wagner (1917–66) stand out as the most illustrious of them all. Many German *Intendant* come from the theatre world and are

or have been *regisseur*, that is, stage directors. The relative weight of stage directors as opera general managers is more important in Germany than in the USA or any other West European country. An explanation lies in the structure of the German theatre organization which is composed of more than 70 *dreiparten*⁵ theatres that combine opera, ballet and spoken theatre. At the end of 2009, in Germany 38 *Intendant* were or had been stage directors; 34 others were or had been former directors of culture, or play writers, dramaturges or former conductors. There is an obvious link between the theatre origin of many German opera *Intendant* and the relative importance of opera stage direction in Germany. This is also one of the origins of the so called *regie theater* artistic movement in Germany.

Nicolas Joel, today directeur of the Opéra National de Paris says: "From my twenties, I have worked on opera stages nearly every day. I owe my training to the general managers of opera houses as different as the Festpielhaus in Bayreuth, the Vienna Staatsoper, the Opéra de Strasbourg which was not at the time the Opéra National du Rhin, the San Francisco Opera, and to stage directors as different as Wieland Wagner, Patrice Chéreau, Jean Pierre Ponelle. I have deepened my understanding and grown in maturity at the Capitole in Toulouse and in the European and American theatres where I staged opera."⁶

Apart from those who went through music or theatre schools and conservatories, opera houses' general managers come from varied horizons. Like Nicolas Joel, many young men and women have grown up in opera houses. The French Thierry Fouquet, while studying at École Polytechnique in Paris, obtained an internship from Rolf Lieberman, and then became deputy director of the Opéra National de Paris. Since then, Thierry Fouquet has always been involved in operatic and/or choreographic activities and is currently the general manager of the Opéra National de Bordeaux. In 1968, Charles Mackay, then involved in the management of the Santa Fe Festival Opera orchestra, obtained from John Crosby, then general manager, greater responsibilities that grew to the point of leading him to the general management of the Opera Theatre of Saint Louis and then to that of the Santa Fe Opera Festival. Joseph Volpe began his opera career as a carpenter at the Metropolitan Opera and climbed the ladder of the house until he became its general manager and stayed 38 years in the house. Walter Vergnano, now Sovrintendente of the Teatro Regio in Turin, had beforehand managed the cultural services of the city. Over the last 20 years, several opera houses' general managers have come from the broadcasting industry. Jeremy Isaacs managed Channel 4, a television channel based in England, before taking the lead of Covent Garden. Tony Hall comes

from the BBC and Peter Gelb from Sony. Their origins shed light on development strategies geared towards multimedia.

The length of the mandates

Three groups of arguments play in favour of long-term mandates: the internal complexity of opera houses and that of their funding processes, the variety of the stakeholders involved in the operational dimension of the house, and the horizon time of programming from 1 to 5 years.

History gives support to this law: success often for those to whom time is given; no significant result or failure almost always for those who lacked time. In the US, the Santa Fe Opera Festival has had two general managers between 1964 and 2008, John Crosby and Richard Gaddes, and Charles MacKay since then. The New York Metropolitan has had two long-lasting general managers between 1969 and 2006, Rudolf Bing and then Joseph Volpe. The same observations are true in Europe: David Webster has led Covent Garden for 24 years; Götz Friedrich, the Deutsche Oper in Berlin also for 15 years; Klaus Zehelein, the Stuttgart Staatsoper for 10 years; Bernard Foccroulle, the Théâtre de la Monnaie for 13 years; Truze Lodder has led the Dutch Opera in Amsterdam together with Pierre Audi for almost 15 years. In contrast, the Opéra National de Paris has had 16 administrateurs between 1945 and 1994, including Rolf Liebermann between 1971 and 1980. In 1994 Hughes Gall fought for the French government to implement six-year contracts for the position of directeur, renewable once. He himself occupied the position for 9 years. Among the Liceu's key leaders, Joan Matabosch has acted as the artistic director of the house for the last 14 years.

3. Governance: shared responsibilities between governing bodies and opera general managers

Those individuals or organizations that play a major role in funding the opera houses also exert the key governance responsibilities and powers: choosing and appointing the general managers as we just saw; deciding the financial format of the houses, that is, their operational expense levels and budgets, as well as their financial and investment policies; and approving the overall opera house artistic activities proposed and implemented by the general managers.

Besides managing the house, the general manager is responsible for setting up artistic programmes and budgets subject to the approval of the financial contributors. The general manager handles the internal

governance of the house. He is at the core of governance, organization and management of the opera house.

The governing bodies' and authorities' landscape: clear in the American opera houses, more complex in Europe

The governance of American opera houses

The governance-related responsibilities belong to the financial contributors who form the financial and social reality of the "ownership" of each American house. Since individual donations surpass by far that of firms, governance-related responsibilities logically fall into their hands. Without such active individuals, American opera houses as we know them would simply not exist. The governance of the American opera houses begins with the powers of their patrons. In the USA, opera house by-laws have to respect the legislation specifically governing not-for-profit organizations. The by-laws define and recognize the board's responsibilities: the appointment of the general manager, the approval of budgets, the artistic activities' funding as well as that of the house or company. Depending on the size of the house, boards of trustees can be composed of up to 100 members. Executive committees are generally composed of 10–15 members. In American opera houses, the general managers report to the president or chairman of their executive committee.

The patrons who bring the highest donations and private contributions often have the most important positions inside the board. The Lyric Opera in Chicago has four boards, all directly or indirectly in charge of finding money to complement or enhance the executive committee's efforts to fund the house. In its global mission, the executive committee is being helped by seven specialized committees. Five of them are centred on financial questions.⁷ The Lyric's director of administration and finance, Richard Dowsek, and members of these committees work closely with one another. The members of the boards and specialized committees are not remunerated. At the Santa Fe Opera Festival, trustees, even those travelling from far away to attend the working sessions of their boards and committees, pay for their own personal expenses. Every single American house's board member does so. The quality of trustee never entitles free seats. American culture recognizes the importance of the individual and disinterested initiatives of the trustees and the general managers know how to mobilize them for opera houses. Comparable features exist in the few European opera houses that are significantly financed by individual donors.

European opera houses' governing bodies and authorities

While “ownership” rules the fate of the American opera houses, in Europe the overseeing power of cities, régions and sometimes of national state administrations governs most of them as in France, Belgium, Holland, Norway and Italy. The great majority of European opera houses receive most of their contributed income from public organizations. A power relationship ensues from it.

The European landscape is somewhat complex. Apart from the power to appoint the general managers, two criteria can be considered simultaneously so as to understand it: the relative weight of subsidies in the houses' funding, the degree of financial and legal autonomy they hold. The first criterion is decisive. The degree of autonomy given to opera houses has often little to do with how much public money they receive. No unique guiding principle can be found, only specific situations which reflect more or less comparable logics.

Opera houses bound to cities or Länder

In Germany, opera houses enjoy significant public funding and hence a variable degree of formal management autonomy. Some houses actually are considered as municipal services. The city's elected representative, often the mayor, chooses and appoints the opera house's leader, the *Intendant*. They set the level of subsidy that will be awarded, follow up and oversee the house's activities. Within cities, regions and länder, responsibilities related to the supervision of the opera houses are shared between elected representatives and local or state employees. Although the situation varies from place to place, the central role of these public authorities and their elected members is vital.

Cities and Länder can choose from several by-laws for the 85 opera houses (*opernhäuser*) which are either specialized organizations such as the Hamburg Staatsoper or assembled in Musiktheater which host them. The main by-laws – *Eigenbetrieb* and *Regiebetrieb* – regulate services belonging to municipalities or Länder. Cities and Länder sometimes also use those of the commercial common law of Gmbh. The *Eigenbetrieb* is said to offer a higher financial and administrative flexibility than the *Regiebetrieb*, and the Gmbh even more so. Both by-laws recognize the strong role of the managing director (*Geschäftsführer*) who is responsible for administrative and financial affairs and who linked with cities and Länder.

All financial or patrimonial operations in these houses are secured by or under the control of the public authorities upon which they depend.

All financial decisions related to the artistic operations are jointly taken between the *Intendant* and the *Geschäftsführer*. This joint responsibility does not interfere with the direct relationship existing between the *Intendant* and the elected representatives of the cities or Länder.

In Erfurt, capital of the German Länd of Thüringen, Guy Montavon, the Intendant of the Theater Erfurt, reports two or three times a year to a cultural committee, chaired by an elected representative. He may be asked to show statements related to his theatre activity, and discuss financial data with the parliament of the city which gathers together 67 people. The theatre sends to the city monthly financial statements and regular information concerning ticket sales, box office revenues and the occupancy rate of the auditorium. Guy Montavon also speaks with the elected representatives of the city and of the Länd.

In Leipzig, Oper Leipzig is also ruled by an *Eigenbetrieb* by-law. A city commission is responsible for all cultural activities financed out of the city budget. This commission is chaired by a deputy mayor in charge of cultural affairs, recruited for a five-year mandate by the elected representatives and paid by the city. Theatres and opera houses in Erfurt, as in Leipzig and many other cities, do not have their own boards of directors. They are directly under the oversight of a municipal authority with cultural competence. Other *Eigenbetrieb* Musiktheater or state operas may have committees where representatives of the cities or of the Länder and *Intendant* and *Geschäftsführer* sit together, as for example in Dresden. Other Musiktheater are ruled under Gmbh by-laws offering a much higher flexibility. On the other hand, Gmbh opera houses not being a city or a Länd organization are weaker than the *Betrieb* if facing financial difficulties. The weak legal identity of the *Eigenbetrieb* and of the *Regiebetrieb* should not conceal their strong social and political recognition.

In Berlin, three opera houses are under the oversight of the foundation created by a law of the city's senate in 2003, the "Stiftung Oper In Berlin". The two former ballet companies of the Berlin Staatsoper (Staatsoper Unter den Linden) and the German Opera (Deutsche Oper) have been amalgamated into a single State Ballet. The third house, the Komische Oper, has no ballet activity. The existing workshops (sets, costumes and props) have been merged into a single organization that works for the benefit of them all. Each opera house enjoys total freedom within its budgets as regards artistic activities. But the autonomy of the foundation comes with a double-bind: the decisions which refer to the three houses have to be approved unanimously by their respective leaders and the mayor of Berlin, who is the also the chairman of the

foundation. The mayor of Berlin also appoints the three *Intendant*, the four *Geschäftsführer* and the three *Musikdirektor*.

In France, cities can also choose between different categories of by-laws for their opera houses. These by-laws provide opera houses with different degrees of autonomy. The simplest model called "*régie municipale*" looks very much like the German Regiebetrieb. Eleven opera houses follow this pattern which defines it as a city service. The "*régie personnalisée*" by-law permits an opera house to have its own budget.⁸ The "*établissements publics de coopération culturelle*" or the "*établissements publics communaux*" offer a larger management freedom.

In Germany as in France, cities and other regional organizations assemble their funding to the benefit of an opera house acting for the benefit of each. In Germany, the cities of Düsseldorf and Duisburg have formed a single house, the Deutsche Opera am Rheine. In the French Alsace region, the cities of Strasbourg, Mulhouse and Colmar fund together the Opéra National du Rhin settled in Strasbourg and touring in the other two cities. The two cities of Angers and Nantes have recently settled and fund together a joint opera house. By-laws differ, but the aim is the same.

In Germany, only the cities and the Länder fund opera houses, never as a rule the central state administration, the Bund. In France, five regional opera houses have been labelled "national", which means that close to 20 per cent of their funding comes from the national Ministry of Culture. These houses stay under local control as cities continue to be their main financial contributors.⁹ As requested by the French ministry of culture, each of them has set up a follow-up committee composed of state and local civil servants with recognized governance responsibilities. Decisions are made or based on the number of performances and productions, box office policy and ticket prices. Committees agree on annual and multi-year budgets, and action plans. The selection of the general managers is a privilege held by the city's mayor but must be approved by the ministry of culture.

In Geneva, the board of the Grand Théâtre, a foundation under public law, is composed of personalities appointed by the city council of Geneva and outside personalities chosen by the board itself. Representatives of the city of Geneva appoint the general manager of the house.

Opera houses directly dependent upon national states

The Brussels Opera "Théâtre de la Monnaie in Belgium, the Norwegian Opera (Den Norske Opera og Ballet) in Oslo, the Dutch Opera

(Nederlandse Opera) in Amsterdam and the Opéra National de Paris in France are noteworthy examples of state-dependent opera houses. All enjoy recognition and notoriety. They have a significant symbolic value at a national level. Public funding is substantial, the management autonomy great and formal approval of their budgets or just agreement on their levels are in the hands of national ministries of culture. Their general managers are either appointed with the state administration's agreements, or directly by public administrators. La Monnaie, a public administrative institution, depends on the Belgian state. Its board of directors includes many members of the political parties represented at the Belgian national parliament. The subsidy received from the Belgian state represented 76 per cent of the house's total funding in 2006–07.

In the Scandinavian countries as in the Netherlands, the governance of opera houses conciliates the dominant role of public administrations in the funding of houses and in many cases the choice of its board members who do not necessarily belong to the public organizations funding them.

The management autonomy is high. The budgets are agreed upon in collaboration with the public administrations. The general managers are appointed by the boards. Norske opera og ballet in Oslo receives as of today 75 per cent of its funding from the Norwegian Ministry of Culture. As a non-profit organization with a local status, its shares belong entirely to this ministry. The latter chooses five board members, appointed for a four-year renewable term. Two members represent the opera house staff members. The board members elect its chairman. Today's chairman, Ellen Horn, is a former actress and was once minister of culture in Norway. The chairman of the Danish Broadcasting Corporation acts as vice chairman. The governance models of Copenhagen, Gothenburg and Stockholm opera houses are comparable to the one of Oslo.

Den Nederlandse Opera (DNO) in Amsterdam's board is composed of six co-opted members. Their selection has to be approved by the Dutch ministry of culture, but this approval obligation may soon disappear. Today, the chief executive officer of Heineken, a jurist from the Nederlandse Bank, an academic, two politicians and Sir Peter Jonas, the former *Intendant* of the Munich Staatsoper, are members of this supervisory board.

When mentioning the Opéra National de Paris governance, the first key word to qualify it is "public". It is a public organization through its by-laws, it receives public subsidies that cover 55 per cent of its budget, eight public civil servants are appointed by the two ministries of culture and of finance and can make all decisions in a board of 12 members;

the chairman's choice belongs to the government. Two other board members are a bank executive, Patricia Barbizet, and the chief executive officer of France Telecommunications, Stéphane Richard, both of them appointed by the government. The Opéra National de Paris artists and personnel have four representatives.

Today, the Opéra National de Paris governance offers a good combination of "public" and private rules with pragmatism towards adapting to a changing environment. Public rules involve the general manager's choice and recruitment by the head of state. The budget approval, and more generally all financial issues, are handled jointly by the opera management and officials of French ministries before coming in front of the board where the same officials sit. The budget becomes final only after it has been adopted by the board, and not before it has been finally approved at a state level. This very rule was first set for the then Académie Royale de Musique in 1712! In its activities and operations, the management takes advantage of the same rules which apply to private industry with a few exceptions such as public tenders for its main markets, and referring to public administration for individual salary decisions over a defined level.

Four highly autonomous opera houses in Italy and Spain

The Italian and Spanish environments differ. Italy is the historical birthplace of world popular opera composers, singers, conductors, stage managers and opera companies and houses. In 1997, a public law transformed 13 opera houses and the famous Sainte Cecile Academy's Orchestra in Rome into public foundations. Each of these foundations is dependent upon the city and region in which the house is located. The law requests that the mayors (*sindaco*) are automatically appointed as chairmen of their boards of directors. Ten to twelve members sit on each board. They represent the city, one or several provinces as well as public or private organizations or corporate firms involved in the foundations and in the opera house funding. The Italian central state administration and foundations are bound by legal ties which have been getting weaker over the past 10 years, due to the regular weakening of the Italian state's funding.

The 1997 public law permits its own future to each of these foundations, depending on the involvement of local organizations and corporate companies. The governance of each of these 13 houses has to be looked at distinctively, depending on the composition and the efficiency of each foundation council. The national wage agreements,

however, complemented by locally negotiated measures, impact all of them. Such a feature also exists in Germany.

Many Italian opera houses suffer to day from the toughest situation in Europe. A number of foundations, either in Rome, Napoli or elsewhere, compound difficulties to difficulties. The state subsidies decline and are not systematically compensated. These opera houses also suffer from a relative disaffection of their audience in spite of cheap tickets. They are often located in architecturally magnificent but thereby expensive to run and too small theatres. Some other foundations such as La Scala in Milan and Teatro Regio in Turin maintain a good level of activities thanks to the support of local communities. Stéphane Lissner feels that his interaction with the board is a key success factor for the house. Since his arrival in 2005, the Scala Foundation's board of directors has set up two specialized committees, one in finance and the other in human resources. It means relying on the expertise and advice of board members having professional experience in their related fields, and building progressively for La Scala its own strategic capacity. Such an evolution brings La Scala closer to the Covent Garden and to the American opera houses' model. Today, La Scala is asking to be completely separated from the Foundation's network created by the law of 1997, and wishes specific rules to be defined to its benefit as far as state subsidies are concerned.

In Turin, the foundation responsible for the Teatro Regio also enjoys a strong governance. The basic structure of the board is not different from Milan's one. Though the environments differ, both are economically wealthy and remain active in spite of the world crisis. The city of Turin has always been active and organized in the field of cultural activities. Walter Vergnano, the present Sovrintendente, was in charge of this responsibility until the year 2000. He then supported a coordination calendar of theatre, music opera, and other performing arts activities so as to ensure that a maximum audience could take advantage of them. Walter Vergnano has always been more inclined to coordinate the various parts of the house, and prepare for the future than personally handle the repertoire choice issues and the whole of the artistic policy. La Scala and the Teatro Regio have the chance to benefit from newly built theatres and from efficient or state-of-the-art back stage facilities.

In Spain, the funding and governance structures of the Gran Teatre del Liceu in Barcelona and of the Teatro Real in Madrid have been deeply transformed in the last 30 years. At the beginning of the 1980s, the private company that single-handedly owned the opera house of Barcelona, the Societat del Gran Teatre del Liceu, was no more able to secure proper funding of the house. At the time, the Societat

shareholders had the ownership of more than 60 per cent of the theatre seats. The box office efficiency and results were very poor. The Liceu was threatened by bankruptcy and might have disappeared if, between 1980 and 1994, three Catalonian public organizations, the Spanish Ministry of Culture and some private corporate firms had not decided to support together the redevelopment of the Liceu's artistic activities. This joint support was reinforced after the fire of 1994 which destroyed the theatre completely. An agreement with the Societat was found. The Liceu's 2009–10 season brochure states: "The reconstruction of the Liceu consolidates the complicity between public administrations and civil society, into a shared management model, the efficiency and originality of which continues to reaffirm itself until today."¹⁰

In 1997, the reopening of the Teatro Real in Madrid came together with the governance being taken over by Spanish public administrations jointly with the patronage of corporate companies and individuals. The Ministry of Culture and the community of Madrid are both major partners of the foundation in charge of the Teatro Real. The foundation is also open to the representatives of patrons and of corporate sponsorship from private or public companies. At the Liceu in Barcelona as in Teatro Real of Madrid, responsibilities with regard to financial and budgetary decisions are shared amongst the founders. In both opera houses, a strong governance organization runs in parallel with stable and long-lasting executives and management.

The United Kingdom case

Public state administrations, the cities or other local authority representatives are never members of any UK opera house board, no matter what amounts of public subsidies they are contributing. The Arts Council England, Wales or Scotland' officers are often if not always offered positions on the opera house's boards, but they do not participate. Those opera houses or companies must be *charitable*, that is, not-for-profit organizations, as defined by English law. Guardianship, as practised in France or in Germany does not exist in England at least for opera houses. On the contrary, English law obliges cultural institutions and thus opera houses to use legal models of by-laws to organize their own governance-related responsibilities and management. Every opera house therefore has a board, with 10–12 members responsible for the fate of the institution. At the Welsh National Opera or at Opera North, the board members are always independent personalities. Boards themselves choose their own members, and take care to be connected to efficient networks. The governance of Covent Garden runs along these lines

and tends to be closer to the American model in terms of governance philosophy.

Will the British model for the governance of cultural organizations and opera houses in particular evolve? One may think so after reading the January 2008 Sir Brian McMaster report written for James Purnell, then British Secretary of State for Culture. Sir Brian McMaster is a former opera general manager in Cardiff and Vancouver. The report urges cultural organizations to base their strategies on the search for artistic excellence, innovation and social openness. It speaks in favour of responsible boards, recommends the presence of artists as members of those boards and says that their most important responsibility lies in the designation of their chief executive. This definition comes close to the one given by Covent Garden to governance and from that of Joseph Volpe with regard to the role granted to the board of the Metropolitan.

Opera houses' general managers' issues and challenges

Opera houses' general managers' role is both classic and complex. Classic because as in any organization or firm, their responsibility extends directly or indirectly to the entire spectrum of management, among which the artistic activities stand. They are assisted by competent collaborators and artists for each of the house's core functions, the number of which depends on the volume of activity. They often deal with brilliant and difficult personalities, and they have to find the proper balance between their best artistic output and an acceptable daily life for all. The complexity of it all has also to do with the exceptional variety of professions, cultures and talents whose inputs build the artistic output and the economic successes of the houses. Sometimes, and more so in Germany than elsewhere, the general managers themselves stage opera works whether at home or for other opera houses. From audience development to the management of the theatres' artistic and technical aspects, the range of responsibilities taken on by the general manager is very wide. As in any other business, details correctly managed are as important as overall brilliant capacities and strategies.

Whatever and wherever the opera houses, their general managers face the same issues: choose a proper organization, manage their teams, ensure an independent artistic management of opera production, sometimes play an active role in the funding of the houses.

Choosing the appropriate organization

Two main models of internal organization stand out. The choice of one or the other depends first on their degree of diversification.

For houses specialized solely in the productions and the performance of operas, as most of the American opera houses or companies are, there is a generally similar model of organization. The general managers make the main artistic decisions with regard to programming – the choice of the works, the number of new productions, performances and revivals – and with regard to interpreters, conductors, stage directors and external producers. They make those decisions alone or share them with executives under their responsibility, but in the end, the decisions are theirs.

They make sure that these artistic decisions are coherent with the budget of the whole season. In nightmare scenarios, they would not. Individuals or teams involved in the casting, dramatic art and technical production of the house work alongside and under their responsibility. A music director is often present, even if there is no permanent orchestra, as there is almost always present a leader of choirs, full or part time. Whatever the words to designate them, the organization always includes a financial director, executives in charge of the stage and of the workshops when the house produces its own sets, costumes and props. Managers in charge of sales and marketing and managers in charge of development have also to identify potential donors, and motivate them to become effective donors. In the USA, but also in the European houses where patronage is being developed, managers in charge of marketing and development often work together with the trustees and the patrons. Many opera houses do possess in-house organizations in charge of special programmes for young audiences on either side of the Atlantic. They also run young artists' training programmes for young singers which are frequent in the American opera houses.

In Europe, artistic activities other than that related to operas are frequent: in-house ballet company, dance, symphonic concerts, operettas, musicals and, as in the previous case, activities dedicated to young audiences and to the training of singers. In the German Musiktheater, the same *dreiparten* (three parts) houses shelter, according to this designation: opera, ballet and spoken theater or *schausspiel*. Almost everywhere, whatever the size of the house and the variety of its activities, the general manager himself takes the major artistic decisions of the lyric production, the choice of the works, the singers and conductors, and the stage directors. When ballet companies are present in the opera houses, they freely organize their artistic activities within a given financial framework. The same is true for *schausspiel* which either has its own stage and auditorium or shares it with the other artistic activities. The Stuttgart *dreiparten* Staatstheater is unique and original: three

Intendant (opera, ballet, *schausspiel*) work side by side. A fourth one, a *General Intendant*, is in charge of finance and administration for the whole theater, but would not interfere with artistic decisions. Yet, he is in charge of the permanent orchestra, working with the opera and the ballet, plus its own concert activities. This is management turned into an art form!

In some houses, as observed at Covent Garden in London and at the Teatro Regio in Turin, the general manager coordinates the various artistic activities and excludes himself from key artistic decisions, namely the choice of the works to be programmed and the choice of artists to be invited, but ensures the economic balance of the whole operational expenses and both earned and contributed income. He would also be responsible for the overall development and strategy of the opera house in close intelligence with the board.

Managing key people, teams and tasks

The choice of the house's main leaders and key executives – musical, artistic, administrative and finance directors – is in the care of the general managers, sometimes also in the hands of governing authorities which act in agreement and coordination with them. In a well-managed organization, all functions have to be equally efficiently managed. This is to say that all of them have to be staffed with great care.

Artistic management is an issue by itself and it equally commands what the opera productions and performances are for. In a 2007 television film, Bernard Foccroulle emphasizes the binding together of artistic creativity and teamwork.¹¹ He insists on the balance he is responsible for to ensure contributions by all artists and technicians involved in the setting up of an opera production, from the stage director to the music director and the singers, from the technical director and others involved in the production. On the contrary, an improper balance between the work and output of the various participants could threaten the quality of opera productions and even ruin them.

Whether an opera house has or has not an artistic director depends on many factors and first on the size of the house's volume of activities. The artistic responsibility is sometimes handled by the general manager, and shared with the music director. The desirable presence of a music director in an opera house is of course linked to the presence of a permanent or seasonal orchestra, and here again to the number of productions and performances. The music director's role is particularly valuable when the time comes to review the quality of the recruitment of musicians, the

diversification of their repertoire, their professional development, and the quality and rigorousness of their management. Difficulties sometimes arise either from ordinary power struggles or from conflicting professional interests between music directors and the general managers of the house, sometimes between music directors and stage directors. An orchestra's music director/conductor seldom manages the totality of the productions of an opera house. According to its contract and the house's practices, he more or less intervenes in the choice of the artists, stage directors and other conductors. He would largely intervene in the productions he himself conducts. There are no general rules. The music director or conductor might take less interest in the productions he does not conduct. He is involved more or less in the artistic life of the house. He often pursues a career outside the opera house he works for and can be tempted to put his own professional interests first. The general manager has to consider both the interest of the house and a proper management of his music director's natural need to develop his own artistic activities. In Europe, the opera houses' permanent orchestras, such as Berlin's or Dresden's Staatskapelle, have a large concert activity, in-house and on tours. The choice of the house's artistic and music directors is normally but not always in the care of the general managers. At Covent Garden the board gets involved in the choice of those meant to hold key functions. The music director, Antonio Pappano, reports directly to the board, as does the chief executive Tony Hall. But teamwork remains the core value.

Teamwork between general managers and music directors is punctuated by moments of failure and success. Some public conflicts between general managers and music directors have ended badly such as in Milan in 2005 (Carlo Fontana and Ricardo Muti), or in Leipzig in 2007 (Ricardo Chailly and Henri Maier). But impressive achievements also take place on both side of the Atlantic: at the Metropolitan, with the now legendary role of conductor James Levine during the mandates of Rudolf Bing and Joseph Volpe, and nowadays Peter Gelb. Between his débuts in this house and July 2009, James Levine has conducted 2456 performances, which is a world record. The Lyric of Chicago (William Mason and Sir Andrew Davies), the Houston Grand Opera, the Santa Fe Opera Festival and the Saint Louis Opera Theater offer the same examples of long-lasting teamwork between general managers and music directors and conductors. In Europe, similar achievements on ten-year periods or so are noticeable: at the Monnaie de Bruxelles (Antonio Pappano and Bernard Foccroulle), at Covent Garden (Antonio Pappano, Tony Hall and Elaine Padmore), at the Stuttgart Staatstheater (Klaus Zehelein and

Lothar Zagrosek), at the Munich Bayerische Staatsoper (Zubin Mehta and Sir Peter Jonas), at the Opéra National de Paris (Hugues Gall and James Conlon), at the Théâtre du Capitole (Nicolas Joel and Michel Plasson). Stéphane Lissner at La Scala in Milan chose a different solution: Daniel Barenboim, Lissner's artistic partner for close to 20 years is the Scala principal guest conductor since 2006. Daniel Barenboim is today *Generalmusikdirektor* of the Berlin Staatsoper. He is also the "life" *Musikdirektor* of Berlin's Staatskapelle orchestra.

The finance directors are the guardians of opera houses' economic and financial health. They actively participate in defining the houses' financial and funding policies. They also have a decisive role in cost control. In Europe as in the USA, the finance directors are recognized as key executives whatever their titles are. At Covent Garden, John Mortlock who acts as deputy finance director alongside Tony Hall, is also the Royal Opera House's company secretary at the board level. In Germany, finance and administrative directors give their agreements to all decisions having a financial impact. They ensure the financial articulation between opera houses, cities and/or Länder. Their appointment results from a formal decision made by these organizations or from their agreement when their choice is proposed by the *Intendant*. At the Munich State Opera, Roland Felber has acted as *Geschäftsführender direktor* alongside several *Intendant* from 1985 to 2008 like Georg Vierthaler at the Berlin Staatsoper and today at the state ballet. Many other European houses do have or have recently had strong finance directors, from the Brussels Monnaie to the Wien Volksoper, from the Oslo Opera to the Strasbourg, Toulouse or Bordeaux Operas.

The existence within the same house of operatic, choreographic and symphonic activities calls for consequent management relationships able to secure the success of them all. The relative weight of these activities in Europe differs from house to house. The combined programming of operas and choreographic works, and prior to it the decisions related to the occupancy of the main stage or of the other rehearsal halls, suppose an accurate anticipation. When asked the question of "who arbitrates at the Opéra National de Paris between opera and ballet?", the ballet manager Brigitte Lefèvre jokes: "the programming"!

Ensuring the independence of artistic management

The artistic independence of the opera houses' leaders is recognized everywhere and claimed as a world must. The members of the boards of directors defend or admit its reality and the need for it. They do not

interfere with the choices of works neither of stage directors nor artists, even though some donors may feel tempted to get involved. This internal freedom at home is a part of the unnamed standards of reputation of the opera houses.

All the general managers we spoke with have cared to underline their dearly held freedom of choice in this domain. None of them ignores the latent desire of their audiences to see and hear the more popular works of Verdi, Puccini, Mozart, Rossini, Wagner or R. Strauss. But no one intends to stay away from innovation with regard to repertoire choices, creations and stage directions, whatever the nuances, the approaches, the degrees of caution involved.

The independence of opera houses' artistic management is nevertheless debated on both sides of the Atlantic. Many general managers of European opera houses consider themselves freer than their American counterparts in terms of artistic choices because of the public origin of their funding. Between 1995 and 2004, never, apart from one exception, has the board of the Opéra National de Paris discussed either the programming or the stage directors' choices made by Hugues Gall.¹² Joseph Volpe gives his answer to an important donor of the Metropolitan who wanted to choose and offer a new sofa for Zeffirelli's *Traviata* production: "That's very generous of you. But as you know, Franco Zeffirelli designed this production, and Franco Zeffirelli likes that sofa" and he adds that the same donor brought a \$25 million dollar cheque a few weeks later to the Metropolitan without any restriction (Volpe, 2006, p. 253). Far from success stories, American general managers happen sometimes to severely judge the possibilities given to the heavily subsidized European opera houses to make decisions with regard to programming and stage directions without a sufficient sense of financial responsibility. Does a creeping temptation to bend the artistic policies of their houses exist in the heads of American donors towards more conservatism? And in Europe, are wide-open and irresponsible artistic policies made possible thanks to the public origin of funding? Reality is hardly so univocal.

The statistical approach certainly indicates that the programming tends to be more conservative in the USA than in Europe, but the situation is not so clear-cut. Everywhere in the world the large size of some auditoriums calls for carefully balanced repertoire choices, and everywhere, the smaller the house or the opera company, the more it tends to be open to novelties.

Opera houses' general managers know their audiences' expectations, their capacity to accept sensible changes in terms of programming or staging, the risks they can afford. In 2008, Andréas Homoki offered the

audience of the Komische Oper in Berlin a production of *Butterfly* staged by Calixto Bielto beginning with very explicit hard sex. Would such a production be staged in Chicago or in Los Angeles? Most probably not. In September 2009, a *Tosca*, staged by the Swiss Luc Bondy opened the 2009–10 season of the Metropolitan and provoked roars in the audience. Did the board of the Metropolitan get involved? “Support on the part of Peter Gelb was there, told Luc Bondy to a journalist, well before the first performance when some Met’s Board members took offence at the fact that I had had the Virgin Mary kissed in the first act and put prostitutes on stage in the second.”¹³ Some trustees were tempted to interfere but Peter Gelb supported his stage director. Gus Christie, president and executive chairman of the Glyndebourne Festival, declares himself open to widening the choice of stage directors, but imposes a limit: “never offend the audience”.¹⁴ Bernard Focroulle writes in contrast to this that “there is treason when the art work is denied, brutalized, threatened The best and the richest staging is the one that stays the most respectful of the text. A text can be read again and again, a tradition be shaken. But I insist, the art work cannot be denied nor brutalized” (Focroulle, 2003, pp. 56–7).

No European or American opera house leader, however attached to his artistic independence, can ignore the financial frame – his budget – to which his artistic decisions are tied. Any programming gives an important place to a repertoire choice of a sufficient number of classics as they more certainly guarantee revenues against more difficult titles. The houses’ leaders who like novelty and provocative titles or stagings know that balance is decisive when programming. Gérard Mortier, at the beginning of his time in Paris declared that he would not present any Puccini opera because he did not think much of them, nor would he invite Anna Netrebko. On the one hand, he dug up Halevy and made the audience discover Hindemith’s *Cardillac* and Szymanowski’s *King Roger*, but, on the other hand, programmed intensely Puccini operas, and casted Anna Netrebko for the sake of the box office. There lies without any doubt a limit of artistic independence: wherever in the world, audiences do not have the same interest for all existing operas and for all existing aesthetics. Opera managers cannot totally ignore their audiences expectations.

Exercising power and leadership

The complexity and the needed unity in opera productions, the organizational modes of the houses, their rhythms and level of activities and the number of talents involved enlighten the opera managers’ ways of

exercising power. Methods and attitudes differ. Centralized responsibilities and authoritarian exercise of power work well together. There is only room for one boss at the Metropolitan, constantly recalls Joseph Volpe. Before he was given all operational responsibilities with the title of general manager of the house, he was opposed to projects meant to redistribute responsibilities between several managers who would report directly to the board. "Power cannot be divided, it can just be delegated", Hugues Gall liked to say, using the words of former French Prime Minister, Edouard Balladur. Nicolas Joel, today directeur of the Opéra National de Paris is convinced of the necessity of a strong and centralized power throughout the entire process of opera production. He states: "Stage managers and the production technical staffs have something to learn from me" and adds: "In commercial, financial and other similar fields, I learn from the talents brought together in the house."¹⁵

The constraints of programming and production are overwhelming. Time is the real dictator, anticipation the best and only way to succeed. Here comes strong the personalities of the general managers and their teams, together with both their anticipation capacities and the unpredictability of many events and the forms of leadership endorsed by each of them.

The leadership and efficiency, the working relations with the close collaborators in the artistic and administrative domains, rest primarily on the general manager's shoulders. At the Lyric in Chicago, William Mason, the house's general manager, has been working for more than 15 years with music director Sir Andrew Davis, and for the same length of time with three main collaborators: Richard Dowsek (administration and finance), Mary Ladish Selander (development) and Susan Mathieson Mayer (communication and marketing). The link between a successful management, professional talents, strong governance and the overall success of the house over a long horizon period must be emphasized.

The relationships kept with the guest artists call for precision – fixing calendars, contracts – and an extreme rigour upon which trust is based. Many houses' general managers make sure to greet the artists right before the curtains rises. Strong signals are sent on both sides: artists appreciate the entrusting and courteous gesture – toy-toy-toy¹⁶ – that precedes every performance; opera leaders let the artists know that each is important to them and for the house and that each performance is unique. General managers and artists do not misread one another. They have precise ideas on their respective reliability and recognize each other's value. Opera managers need good artists and artist's availability.

Fees of course are a key issue. Motivated artists suggest roles and do everything they can, when needed, to be available for the houses and the leaders they like to work with.

The opera performances knit powerful ties between a boss, his staff and the audience. In September 2008, the Opera of Los Angeles brings on stage Verdi's *Don Carlos*. The curtain must go up at 7 p.m. and James Conlon is set to conduct the performance. From 6 to 6:45 p.m., Conlon presents the work in the foyers of the Dorothy Chandler Pavilion in front of a group of one or two hundred of obviously ravished spectators. This was altogether communicating on a Verdi masterpiece and building a reliable relationship with the public and the donors.

Well-appreciated performances also make for more easy-going relationships. Many general managers receive an incalculable number of letters and e-mails expressing satisfaction, dissatisfaction, suggestions or critiques related to performances. Hugues Gall used to answer them all.

Personal abilities and behaviour are decisive in any field of activity. When the French Stéphane Lissner is appointed to succeed Carlo Fontana in 2005, he arrives at La Scala alone without any aide or assistant. He will have a totally direct relationship with the executive team and this will be a strong asset. At the beginning of the 1980s, at the Metropolitan, Joseph Volpe had not the slightest responsibility towards the musicians. While a severe conflict between the musicians and the administration of the house developed, he soon appeared to be the only one capable of concluding an agreement that would finally put an end to it. He then earned authority to a level no other leader of the house could then aspire to. Legendary other success stories could be added. Sometimes the stories do not have such happy ends. Successfully managing opera house calls for excellence.

The search for funding calls for strong skills in convincing and motivating people, in opera houses as anywhere. Whatever the trustees' and finance officers' help and involvement, the American opera houses' general managers devote an impressive amount of time to the houses' donors.

The relationship with the city community and mayor is always a major communication issue. The stakes are alike in Amsterdam, Berlin, Chicago, Dresden, Cardiff, Erfurt, Houston, Lyon, New York, Saint Louis, Santa Fe. If the Stuttgart Staatsoper was nominated "opera of the year" in Germany on four occasions, it had a lot to do with the leadership of Klaus Zehelein and with the quality of the relationship he built with the city and the population of Stuttgart. Tony Hall, chief executive of the Royal Opera House, was selected to become a member of the

organization committee for the Olympic Games in London and to chair its cultural committee. It is a plus for Covent Garden.

Links between artistic and financial decisions and issues

Such links may be viewed as facts, states of minds and management practices. Marc A. Scorca reminds: "Rudolf Bing, who was general manager of the Metropolitan Opera from 1950 to 1972, said that for every artistic decision there is a financial implication and for every financial decision there is an artistic implication."¹⁷ The same appreciation is true for any opera house or company in the world, and for any cultural activity. That is a fact, but it has also something to do with attitudes. Whatever the environment, opera houses' executives are more or less driven by the necessity to think and react permanently so as to manage the two sides – artistic and financial – of any opera production and performance processes, given their personalities and characters. Then management practices differ given the environments. The management link between artistic and financial issues is extremely strong and natural in the American opera houses, symbolized by the historically famous William Mason's assessment: "I run an opera house, I also run a \$55 million business." Professor Gerd Uecker states: "In Europe, where environmental constraints differ, it may happen that artistic and financial issues are not understood the same way in opera houses and in public organizations supporting them. The difficulty for opera houses in times of sinking budgets is to provide a programme that is both of high artistic value and appealing to the public. In addition, opera houses are faced with the problem of an increasingly economically oriented assessment of their performance (or activities) by the support body, especially with regards to its financial contribution. Most of those support bodies are not endowed with a sufficient understanding of artistic value, of esthetical innovation and of the importance of art for the cultural environment of a province (*Land*) or any other place (*Standort*)."¹⁸ William Mason's and Professor Uecker's views have to be understood in their respective environments. In the American one, the general manager and his team working in close connection with their trustees are responsible for managing both artistic and financial aspects of the house. In the German context, the *Intendant* faces the same necessity, but public policy constraints interfere with his management.

Such issues, managerial and behavioural, linked to totally different environments will be central to the opera houses' future economic and business models of tomorrow.

4. The influence of labour unions and artists

Unions have been influential in opera houses since the end of 19th century both in Europe and in the USA. Everywhere labour unions negotiate on wages and working conditions. The level of harshness of negotiations depends on local negotiating traditions and on management capacities. Partly national and partly local, depending on the countries, the negotiation processes, as difficult as they may sometimes be, generally result in three-year agreements rarely questioned during their validity period.

They weigh heavy on the evolution of wages and salaries that have everywhere become one of the most important budget items in the expenditure column.

5. Governance and economic performance

Economic performance and coherent governance are undoubtedly connected. The past of any opera house proves it. That of the Opéra National de Paris is a good example (Agid and Tarondeau, 2007). In the USA, from one house to another, strong and stable periods of governance run parallel to artistic achievements and economic performance. Today's acute economic and financial difficulties bound to the current world crisis strengthen the issue and make the challenge more difficult than ever.

The conditions for successful governance in opera houses can be identified with a number of good practices observed on both continents.

Interaction between artistic achievements and care to the financial management of houses and opera productions is natural and vital in the American opera houses, where nothing like recurrent public subsidies exist. Let us turn again to the Chicago Lyric: "I hope you'll keep in mind the essential relationship between great opera and good economics", writes Richard Kiphart, the president of the Lyric Opera in Chicago in the fall of 2008, "The efficient management of Lyric's finances is crucial in making possible the brilliance you see and hear on stage. As President and CEO of this great company, I spend much time with my fellow trustees of Lyric's board as well as with general director William Mason and his colleagues, in examining the bottom line in every aspect of Lyric's operation."¹⁹

Successful governance also depends on the clarity of the respective roles held by the general managers, the boards' trustees or the councils' managing directors, and, in Europe, the mayors, the elected representatives or the local or national state employees. "Hiring the general

manager, says Joseph Volpe, does not give the board the power to tell him or her how to run the company. It does not include advising him or her what operas should be performed, nor who should direct, design, sing or conduct them If the board is dissatisfied with the general manager, it can replace him" (Volpe, 2006, p. 252). If Volpe speaks at first in favour of a respect for the respective roles of each, he does not forget insisting on the importance of trust and strong relationships between the general manager and the president of the board: "The Met can function at its highest level only when the president and the general manager have a close working relationship and a trust on each other's judgement" (Volpe, 2006, p. 249). The assertion has a universal value.

The efficiency and capability of the general manager, his careful recruitment and a long enough horizon time offered to him are prerequisites for good governance. Choosing them is quite an issue because one expects that they will have both excellent artistic and management capacities. The omni-competent general manager probably does not exist. On the other hand, the capacity to pretend to exercise with absolute power is timeless. Being able to manage with success the relationship with people one feels difficult to deal with but who are assets to the opera houses is an important strength.

Behind the appointment of the general manager lies the capacity either from board members or from public organizations to make precisely the good choices. A board is efficient if the board members are correctly selected, and much will also depend on who is chosen as a chairman. When times are difficult, strong and reactive boards are very welcome. The same capacities are expected from public organizations-in Europe – when they assume totally or partly the same responsibilities as the American and some existing European boards.

Opera houses' governance capacity and strength is not only a question of how long it has existed. The Opéra National de Paris governance was efficient between 1830 and 1930. It was poor from 1945 to the middle of the 1990s and strengthened again after. In Houston, Saint Louis and Santa Fe, opera houses were set up after the Second World War like the Chicago Lyric where the history of previous opera houses was not completely forgotten. Effective governance, management professionalism, opera culture and know-how were rapidly assembled. This was made possible because the key factors for success were clearly identified, and donors decided to give money.

8

Tensions, Conflicts and Recent Crises

Opera houses are no strangers to the tensions, conflicts and crises that affect or can affect any organization in any field of human activity, in any part of the world and at any period of history. If several general directors of American opera houses use the French term *édifice complexe* among themselves to qualify the institutions they manage, it is probably because tensions and difficulties of all kinds are their daily lot. Eight opera houses, including one foundation comprising three houses, have faced or are currently facing crises of varying scales and durations, with effects that may be short-lived or longer-lasting: the Opéra National de Paris, Covent Garden, the Grand Théâtre de Genève, La Scala in Milan, the Oper in Berlin foundation, Oper Leipzig, the San Francisco Opera Association and the New York City Opera.

No opera house escapes professional and pay-related tensions with the people they employ under highly diverse arrangements. This chapter discusses the problems posed.

1. Eight recent crises

The first few crises examined here originated in change that was desired or imposed but poorly managed; the rest arose from disagreements between managers at the same opera house; often, both elements are combined.

Crises involving adjustment to desired or imposed change

Opéra National de Paris, 1989–94

From 1989 to 1994, the Opéra National de Paris went through one of the toughest, most complex crises in its history. The causes of the crisis went

deep; it originated in a combination of options and problems interacting with each other.

A new theatre for the Opéra National de Paris was considered necessary from 1976. The erection of a new 2,703 seat opera house – Europe’s largest, not counting the arenas at Verona and Orange – was the culmination of a process that began in 1976 when the French government requested an in-depth audit of the Palais Garnier (Bloch-Lainé, 1977, p. 7). The reasoning breaks down into three stages.

First, an official criticism of the Palais Garnier:

“The Opera’s theatre can no longer be filled and be the talk of the town as it was when first designed, nor even as in the past few decades. In the Second Empire, in a small affluent sector of society, it was the done thing to have a box at an Italianate theatre. Garnier built a large stage with a relatively small auditorium, set in the midst of vast foyers intended for society life. The high society aspect of the performances was the dominant element for a long time. Also, the Republic used the Palace for official festivities which consecrated it in a way that is rather peculiar to France; the general public has never felt at home there as much as they do in Italy and Germany. The true lovers of singing and dance who attended the opera between official ceremonies were chiefly interested in the artists’ technical feats. And so the institution existed, with neither great glamour nor great tragedy . . .”

(Bloch-Lainé, 1977, p. 5)

Then a hesitancy over the city of Paris’ operatic vocation: “Must Paris,” wondered the auditors, “have an opera like all capitals have a zoo, and only do what it takes to compare honourably with the operas in other great cities? Or do factors exist in France and elsewhere that can make the arts of opera and dance one of the principal components of national cultural activity?” (Bloch-Lainé, 1977, p. 7).

A recommendation to build an opera theatre able to seat 3,000 spectators comes as a conclusion: “Opera must come out of the Palais Garnier. A naturally expensive art form, at the Palais Garnier opera finds the optimum conditions to combine minimum democratisation with maximum expense, the lowest number of spectators with the greatest pomp in performances, the highest operating costs with the smallest percentage of self-generated income despite charging the highest ticket prices” (Bloch-Lainé, 1977, p. 151).

“The [Bloch Lainé] mission is convinced that the answer lies in construction in Paris, in the heart of the city if possible, of a large, modern 3,000-seat opera house. Only construction of a facility of this kind can respond to the expansion of opera, multiplying the number of spectators by four while considerably reducing ticket prices.”

(Bloch-Lainé, 1977, conclusion)

But what would be done with the Palais Garnier?

Circumstances surrounding the start of the Opera Bastille project. The aim of creating the Opera Bastille was to bring into existence a “people’s” opera with large capacity and state-of-the-art stage and set facilities.¹ The new building’s stage and auditorium had to be suitable for between 250 and 280 performances a year. Several of the technologies on the new stage, such as the motorized, computer-controlled set-moving trolleys, had never been used anywhere else before. The fire curtains in the set assembly rooms below the main stage and the sprinkler systems also incorporated new technologies. The size of the stage area, with a 28-metre proscenium arch for the main stage, had far-reaching effects on production; the stage needed to be “occupied”, and stage directors faced challenges never encountered before: how should the enormous space of this new stage be filled? Its size generated production and performance costs that were partly proportional to the dimensions. In a comparison of the stages at the Vienna Staatsoper and the Opéra Bastille, Michel Bieisse, currently deputy technical director at the Opéra National de Paris, observes Paris’ technical disadvantage compared to Vienna. Under the cumulative effect of these technical difficulties, operations at the Opera Bastille took a long time to get off the ground, advancing gradually from 1989 to 1993. A learning period was necessary.

Ambiguous coexistence of the two theatres, Palais Garnier and Opéra Bastille, between 1989 and 1994. Ambiguity remained over the artistic purpose and specialization of the two theatres, as the Opéra National de Paris also runs a ballet company and offered at the time approximately 150 ballet performances on the Palais Garnier main stage. The Opéra Comique, also known as the Salle Favart, became independent and left the Opéra National de Paris umbrella body in 1989. The modular adjustable theatre planned at Bastille was not finished and probably never will be.² The problem lay in the juxtaposition of the Palais Garnier and the Opera Bastille. Everything progressed as though the designers of the new theatre were convinced that all operas produced by the Opéra

National de Paris in the future would be staged at the new Bastille opera house, as the Bloch-Lainé report had recommended. But some of the Opéra National de Paris traditional audience were very reluctant to abandon the traditionally magical venue of the Palais Garnier. In February 1989, Pierre Bergé, chairman of the Opéra National de Paris organization, could not contain his exasperation: “The Palais Garnier? It should have been torn down like the New York Met, sold, leased to the Japanese, opened to visitors like the Théâtre Gabriel at Versailles. Since we couldn’t do that, we had to invent a national destiny for it...”.³ Naturally, that national destiny was identified with the ballet company’s future. The opera house’s dance productions have been at home there for years, to the continuing satisfaction of all. Until 1994, the number of operas performed at the Palais Garnier could be counted on the fingers of one hand. Ballet lovers were quite satisfied with the new division of duties between the theatres, particularly as ballet was also successfully presented at Opéra Bastille. But admirers of the Palais Garnier could not bring themselves to accept the end of operatic activity there.

Industrial unrest and unplanned costs. Tensions and industrial unrest existed prior to the opening of the Opéra Bastille, but the difficulties intensified when the new theatre was opened. Even before 1989, the technical staff held two separate and conflicting visions of professional practice. At the Palais Garnier, the stage technicians were traditionally employed in fixed teams, on schedules set 1 year ahead regardless of the programming and production complexity. These practices were criticized as being inappropriate for the variability of artistic and technical production, and seen as expensive and lacking reliability. At the Opéra Bastille, there was a call for flexible working hours that could be modulated according to the workload, the specificities of productions and, the keystone of the new organization, “production continuity”: the same technicians should take part in all phases of the same production, from preparation to each performance. In 1988, the baleful prediction went out that “the best people will go to Bastille”. Successive industrial conflicts arose. In 1993, after strikes that sent out a negative image of the new Opéra Bastille, a professional agreement applicable to both theatres was signed. This agreement was costly in terms of the financial rewards for flexibility and legally risky because many of its clauses were open to contradictory interpretation, paving the way for more conflicts. It did not please the staff at the Palais Garnier, who contested the way work was to be organized at Bastille, and were concerned about the concentration of operatic activity outside their own theatre. The determination of

the numbers of back stage personnel led to more successive incidents. It was initially believed that given the latest technological equipment at the Opéra Bastille, only a small number of technicians would be needed. While the Palais Garnier was closed for renovations between 1994 and 1996, its previously disparaged technicians were sent as reinforcements to Opéra Bastille. The combination of the old hands from Palais Garnier and the new recruits at Opéra Bastille turned out to be explosive. One demand followed another, and the conflict led to a long, expensive strike in June 1995.

The small number of opera performances in 1990 and 1991 limited box office income, and that income was weakened by a determinedly low ticket price, in keeping with the “people’s opera concept” that prevailed at the time. The 1993 agreement had financial consequences of its own. Both the culture and finance ministries expressed their irritation at moves that were contrary to plans and had significant financial implications.

Unlikely governance. In this context, the governance of the Opéra de Paris was both a cause and a consequence of the troubles, with a cumulative impact. In late 1988, French President François Mitterrand personally selected the couturier and businessman Pierre Bergé to take over as head of Opéra National de Paris, replacing Raymond Soubie. Pierre Bergé did not intend to direct the opera himself, but wished to approve all the artistic choices to be decided. One of his first decisions was to dismiss Daniel Barenboim, who had been chosen by the previous management. The world of opera was in dismay. But at that time selection and appointment of all the opera’s highest executives was in the government hands. After a game of musical chairs that lasted through late 1988 and early 1989, Dominique Meyer in 1989 and 1990, Philippe Bélaïval from 1991 to 1993, Georges-François Hirsch, during the same period, Jean-Marie Blanchard, from 1993 to 1994 took up high-level posts. Unforeseen difficulties at the opera house racked up the tensions between these personalities. Internal conflict within the management was aggravated by the technical and financial difficulties and industrial unrest summarized earlier. They added their effects to a slack work organization, partly explaining the high management turnover. The French state retained the control, but had no expertise in organizing and running an opera house – especially a new theatre supposed to have popular appeal, and with state-of-the-art technology.

The chorus and ballet company were spared the confusion of the labour, professional and management disputes. Convinced that no

leader of similar stature would agree to succeed Daniel Barenboim, Dominique Meyer suggested to Pierre Bergé that they should engage a young and promising conductor, Myung Whung Chung. Chung worked successfully with the orchestra and chorus, achieving real progress. Meanwhile, Jean-Albert Cartier took care of the ballet. The ballet school, placed under the management of the Opéra National de Paris, was directed with an iron hand by Claude Bessy and kept out of the turmoil. The school provided regular quality additions to the company.

Emerging from crisis. Two events accelerated the course of events. The tragic collapse of a set in Seville during a rehearsal of *Othello* in 1992 left one member of the chorus dead and 40 others injured. This mishap dramatically revealed the difficulties of the opera house, which was not ready to take one of its productions touring to a foreign stage. Jacques Toubon, France's new minister of culture after the 1993 elections, brought in an undisputed professional, Hugues Gall, who at the time was the general director of Geneva's Grand Théâtre after acting as Rolf Liebermann's right-hand man at the Opéra National de Paris between 1971 and 1980. Gall agreed to the move, on condition that he would hold all artistic, administrative, financial and industrial relations powers, that this would be reflected in new by-laws and that the state made a commitment to provide the requested subsidy every year, based on a six-year business plan. None of the staff except himself (and in fact, the chairman of the board) would any more be appointed by government ministers; that power would be his alone. He intended to bring a more professional approach to management of the house, which had suffered from ambiguous relations between the opera house and the French state since the end of the Second World War. The opera directeur's contract would be for a six-year, renewable term. Gall himself undertook commitments for the same period on key figures for future results. He proposed a compromise on the respective lyric and dance vocations of the Palais Garnier and Opéra Bastille; two thirds ballet and one third opera at the Palais Garnier, and inverse proportions at Bastille. The French government, keen to put an end to the crisis that had begun in 1989, accepted the conditions laid down by the man it wanted to put in charge of the opera. In 2004 when Hugues Gall left, it could be observed that the commitments made on both sides had been honoured (Agid and Tarondeau, 2006).

The strong organizational and managerial assessment proposed by Hugues Gall which was accepted by the French government in 1994 appears in 2010 to have been efficient. From 1945, the Opéra National

de Paris had lost the reputation it had enjoyed until 1939. Daily management interferences between public administrations and the opera houses do not exist any more. The new directeur is both artistically and financially responsible for the opera house activities, which is not far from the American vision of an opera house general director, that is to say he has full responsibility to run the house. The new by-laws recognize that all executives are appointed by the directeur, not by the ministries as it used to be before. As in any correctly governed opera house, public administrations exert a global responsibility in ensuring that the opera house fulfils rightly the mission for which public subsidies are brought. The only but important traditional feature of the new organization remains the composition of a board strategically dependant from the French government and public administration.

Royal Opera House (Covent Garden), London, 1995–99

The post-Second World War history of Covent Garden is the story of an undisputed artistic and commercial success; led by just two directors between 1946 and 1988 (the Opéra National de Paris had 13 directors over the same period). Sir David Webster was at the helm for 24 years (1946–70) and Sir John Tooley for 18 years, receiving the greatest conductors, directors and singers of the period. Jeremy Isaacs succeeded him in 1988. The chairman of the board in early 1995, Sir Angus Stirling, had been in his post since 1991 and one of the trustees for 17 years.

A new theatre was needed for the Royal Opera House: Covent Garden would be rebuilt on the same site

The decision to rebuild Covent Garden had been in preparation for 15 years. The theatre vitally needed modernization and safety work, and brand-new stage facilities incorporating the technological advances of the past 20 years. It was in a similar situation to the Opéra National de Paris 10 or 15 years earlier. The stage was on its last legs, and very promising architectural plans had been drawn up. A completely redesigned stage area would, as at Bastille, foster better productivity and facilitate alternation. The auditorium was to be renovated on the same layout. The faithful patrons of the Royal Opera House would still have the same beloved theatre. Two smaller auditoriums would be built for smaller-scale productions. A great hall, the famous Floral Hall now called the Paul Hamlyn Hall, would provide a venue for a very wide range of artistic and social events. The Royal Opera House sold several plots of land to reduce the cost of the redevelopment. The new urban complex at Covent Garden – the opera house, the charming market and the

restaurants all around – would still form a centre of artistic and tourist attraction unique in London and the world. The opera house was due to be closed from July 1997 to early 1999. Two years before the start of work, who would have thought that the Royal Opera House was possibly about to go through the most serious crisis of its entire existence? When the first difficulties emerged in 1995, who would have imagined how quickly matters would deteriorate? Lack of forward planning for the risks inherent to the closure led to a dual crisis: in finance and governance. In the end, a UK Parliamentary committee took matters into its hands and determined the necessary conditions for finding a solution. The Royal Opera House emerged stronger from the crisis, which provided lessons for the opera house's future management.

Insufficient forward planning for Royal Opera House operations during the closure triggered doubts over financing

The closure had been in preparation for several years without a sufficient evaluation of its overall costs. Jeremy Isaacs has admitted as much more than once in the book he wrote about the period. "We would have to demonstrate, before the second tranche of Arts Council funds was made available, that we had satisfactory plans for the closure period. We had not" (Isaacs, 1999, p. 275). In the "Après moi" chapter of his book, he adds "What is true is that at every stage my colleagues and I underestimated the real costs of closure" (Isaacs, 1999, p. 326). As early as March 1995, suspicion had developed between the chairman of the board and Jeremy Isaacs who was due to retire in September 1997 and who was asked to concentrate on the closure and, more precisely, the scheduling of work for the opera and ballet companies (Isaacs, 1999, p. 276).

Skeptical of the financial forecasts presented, the board requested that they should be revised and new cost savings plans devised. Even before the closure, the balance between box office income (ticket prices were among the highest in Europe), Arts Council funding and private donations was required, but soon appeared to be problematic. One after another, all the financial parameters whose stability had hitherto provided Covent Garden's sound financial basis faltered. News travels fast in London and financial uncertainties in one place seemed to feed financial uncertainties elsewhere. Executive's turnover developed as early as June 1996. External audits of funding requirements took place in 1995 and 1997, subject to some contestation. The Arts Council England was due to provide £78.5 million of funding in two steps from UK National Lottery profits, but before any payment it wanted to be certain of the Royal Opera House's financial viability, particularly regarding operating

income and expenses during the closure period. Covent Garden management was determined to maintain a high volume of opera and dance productions, with sound reasons: the vital need for ongoing box office income, and the equally important need to carry on working and continue artistic performances and training. But finding a venue for production and performance became a nightmare, because identification of possible theatres and the necessary agreements were not tackled far enough in advance. All of London's great theatres were considered, from the Palladium to the Theatre Royal, Drury Lane (the choice favoured by Jeremy Isaacs and his team), or the Lyceum which was too small (1,700 seats): although it was located close to Covent Garden, this would cause a loss of £7 million per season and also require 100 staff to be laid off. Then an apparently miraculous opportunity arose: from-scratch erection of a cheap, brand new 2,500-seat theatre on the Tower Bridge site, built to last up to 50 years. This project was the brainchild of architect Ian Ritchie, and was taken up by Jeremy Isaacs and the Royal Opera House board. Examination of the plans caused disputes and fell behind schedule. By the time permission was granted after a lengthy procedure, it was too late, and the project was no longer of interest to Covent Garden: the new theatre would only be ready in time for the last 10 months of the closure. In the end, the Royal Opera House companies staged performances in several different London theatres, and went on a number of tours, but operating income never reached the level a 2,500-seat theatre might have generated, nor did it match the forecasts established in 1995. Donations and private funding were down, which truth told was no great surprise. In the early 1990s, they had totalled an annual average of up to £7 million. In 1995, Covent Garden expected a drop in the order of £2–3 million. Vivien Duffield played a key role, raising funds for the renovation work with a target of £70 million and asking patrons to continue their normal donations and contributions. The second objective was more elusive than the first: donors' motivation declined during the closure.

A governance crisis alongside the financial crisis

In January and February 1996, the British TV channel BBC2 showed a documentary series (six 50-minute episodes) on Covent Garden, named "The House", which set the tone. Jeremy Isaacs had given the film crew led by Michael Waldman carte blanche: they had access to the stage area, the workshops and offices, with authorization to film whatever interested them and no say by the opera house in the final cut. Some of the scenes of management filmed as they happened, such as the

dismissal of a high-level executive, gave the impression that management were very uncaring. In Jeremy Isaacs's view, "what we did see was a skillfully mixed pot-pourri of incidents – funny, tense, contrasted, but wholly unrelated to any intellectual overview" (Isaacs, 1999, p. 244). In the context of the contemporary crisis, this series did not help the opera house's communication policy.

The governance crisis took four forms. First, it was reflected in a high turnover of chief executives. Sir Angus's term as chairman ended in August 1996 and he did not seek reappointment. Peter Chaddlington replaced him early in 1997 and preparation began for the post-Isaacs era. There were five chief executives between 1995 and 1998! Gennista Macintosh, former director of the Theatre Royal, took over in January 1997. Five months later, in circumstances that remain unclear, she was replaced by Mary Allen, former secretary of England's Arts Council which subsidizes the Royal Opera House. Allen took up the post in September 1997 but stayed less than 6 months. Pelham Allen, from audit firm Coopers and Lybrand, arrived in March 1998 following a report by the UK Parliament's Select Committee. In September 1988, the American Michael Kayser was appointed chief executive of the Royal Opera House. This coincided with the beginnings of a return to order. Second, there was some overlap of responsibilities between the chairman of the board and the chief executive (Sir Peter Chaddlington in practice occupied both functions between September 1997 and March 1988) and the ambiguous relationships between the Royal Opera House and the Arts Council (headed at the time by Grey Gowrie) were noted. Jeremy Isaacs has far from fond memories of relations with the Arts Council England: "I can remember virtually nothing of the meeting we had with the Arts Council on 21 December 1995; it was so horrible that I have suppressed the memory, having only a dim recollection of abuse and recriminations of men and women behaving badly" (Isaacs, 1999, p. 300). Third, the governance crisis also originated in the way the house was organized. Both Gennista Macintosh and Mary Allen stressed its dispersed, fragmented nature, as did Jeremy Isaacs. The opera and the ballet each enjoyed a high degree of autonomy, and the Royal Opera House was legally independent of the theatre. Several years later, Ruth Jarrat, then director of policy development at the Royal Opera House, took an identical view of the organization at the time: there were too many entities with too much independence in relation to each other.⁴ Fourth, a range of new solutions were proposed: should Covent Garden not be turned into a people's opera rather than an opera for the elite? Jeremy Isaacs comments: "You cannot have a People's opera unless the people

are prepared to pay for it" (Isaacs, 1999, p. 319). In 1997, the British Secretary of State for Culture, Chris Smith, suggested placing the Royal Ballet, the Royal Opera house and the English National Opera under the same management, and selling the Coliseum theatre to help finance Covent Garden. "This proposal was dead in the water" (Isaacs, 1999, p. 329).

Parliament intervenes with its own demands

Intervention by the House of Commons' Select Committee for National Heritage led by Gerald Kaufman managed to move the situation on. The Select Committee began interviews on 24 July 1997 and reported its conclusions on 3 December the same year. Sir Angus Sterling, the board and Jeremy Isaacs were criticized for poor planning ahead of the closure, and for failing to report adequately on the house's financial position for years. The same criticisms applied to Sir Peter Chaddlington, the Arts Council and Mary Allen. The Select Committee called for the resignation of the entire board and the chief executive. The Secretary of State for Culture was to appoint an interim manager. If the board members refused to resign, the Arts Council should stop all funding for the Royal Opera House.

Sir Peter Chaddlington and the members of the board duly resigned, and Pelham Allen, a consultant from Coopers and Lybrand, acted as chief executive officer until he was replaced by Michael Kayser at the end of 1998. Covent Garden emerged renewed and transformed, arousing pride and satisfaction. The new theatre was inaugurated in February 1999, and Tony Hall took over the reins in January 2000. The decisions that helped to bring the Royal Opera House out of the crisis reflect the scale of the underlying causes. A newly unified organization reporting to a single board of trustees replaced the separate components of Covent Garden that previously had their own boards and operated with relative autonomy: the ballet, the opera, the Society of Friends and sponsorship management. A single chief executive officer was now responsible for all activities in the house. Selecting a chief executive officer able to successfully manage and develop these activities and oversee appointment of the right key executives is the task of the board, as stated in the Annual Review for 2007–08. The lessons of the crisis have been learned. With hindsight, it is as if all the ingredients of Covent Garden's balance were in temporary but grave danger of breakdown: the management itself, the erosion of box office income which cast doubt on ticket price levels, the falloff in donations and private funding because donors were less motivated while the theatre was closed, the hesitancy

of the Arts Council, the doubts of certain trustees and questions over the very future of the Royal Opera House. At the height of the crisis, major decisions were taken to reduce overheads. Around a hundred permanent jobs were cut. Employment contracts were made more flexible. New measures were taken allowing Covent Garden to broadcast its productions on television and radio with no indemnity for musicians and house staff.

Ten years later in January 2010, Tony Hall is still chief executive. Covent Garden has regained stability. In economic and financial terms, the new Covent Garden model relies more than the old model on box office income, donations and private funding, and commercial income. The Arts Council now provides only one third of the total funding, compared to approximately 60 per cent some 20 years before.

Staatsoper, Deutsche Oper, Komische Oper in Berlin, 2003–10

On 16 February 2009, the German opera magazine *Opernwelt* held a public meeting in Berlin to discuss the future of the capital's three opera houses. Six hundred people attended, including Jürgen Flimm, appointed to take over as Intendant of the Staatsoper from 2010, Kirsten Harms, Intendantine of the Deutsche Oper, Andréas Homoki, Intendant of the Komische Oper, Stefan Rosinski, who had recently resigned from his duties at the Oper in Berlin foundation, and many other personalities from Berlin's political and musical circles, among them Klaus Zehelein, formerly the Intendant of Stuttgart's Staatsoper and the president of the Opernkonferenz. Gérard Mortier, who was still at the helm of the Opéra de Paris, announced amid general hostility: "The Staatsoper and the Deutsche Oper must be merged." Are Berlin's three opera houses in crisis?

A unique but fragmented opera offering

In 2007, these three opera houses staged a total of 471 performances of 124 opera productions: 98 revivals and 26 new productions!

The reader should bear in mind that these figures respectively concern three theatres (Berlin), one theatre (Covent Garden) and two theatres (Opéra National de Paris), excluding the activities of the smaller auditoriums in each one (Table 8.1).

All three Berlin opera houses have a world reputation. Held in fond esteem by the local people and with a history stretching back to 1742, the Staatsoper, which currently has Daniel Barenboim as its GeneralMusikdirektor, has one of the most admirable operatic traditions in Europe and also boasts a top-class orchestra, the Staatskapelle. The

Table 8.1 Comparison of key figures for three opera institutions

In millions	Berlin 2007 (one foundation, three opera houses, three main stages)	Covent Garden, London 2007 (one opera house, one main stage)	Opéra National de Paris 2007 (one opera house, two main stages)
Total budget	€158	£90.2	€175.36
Public subsidies	€109.15	£25.6	€99.33
Budget funded by subsidies	70%	28.4%	56.66%
Box office income	€22.7		€45.34
Budget funded by box office income	14.37%	37.14%	25.86%
Total spectators in the main auditoriums	689,873	620,805	666,613
Total spectators for opera	591,176	318,130	354,455 (93–97% occupancy)
Total spectators for dance	98,697	302,675	309,158 (100% occupancy)
Average occupancy rate	72.5%	93%	95%

people of Berlin are just as attached to the Deutsche Oper and the Komische Oper, which date from the early 20th century. Götz Friedrich, one of the most famous German stage directors of the last century, managed the Deutsche Oper for 20 years and in the late 1990s worked alongside conductor Christian Thielemann. Andréas Homoki runs the Komische Oper, and is not averse to engaging stage directors who unsettle and provoke audiences. The auditoriums have only low capacity: 1,396 seats at the Staatsoper, 1,885 at the Deutsche Oper, 1,208 at the Komische Oper. The combined average occupancy rate for the three opera houses was approximately 73 per cent in 2007, which is very low compared to several houses in major European capitals (90 per cent or over) but consistent with average levels for Germany. On the Berlin operatic scene, Daniel Barenboim has an aura resulting from his outstanding career as a conductor and player, as well as his initiatives for Israeli-Palestinian reconciliation, symbolized in the formation of an orchestra open to players from both communities. The Green senator Alice Strövel jokes that Daniel Barenboim has perhaps Chancellor Angela Merkel's mobile telephone number, but she does not!

In 2003, the city of Berlin intended to reduce funding for the three opera houses and streamline their activities

Since the early 1990s, the city of Berlin has sought to cut the amount of funding provided to the three houses (it supplies 70 per cent of their budget on average), and rationalize their artistic activities.

In 2003, it announced that it intended to reduce by €35 million the total subsidy for the three houses, which at the time totalled close to €100 million; a cutback on this scale suggests that a massive restructuring will be required! Thirty-five million euros was also the value of the subsidy received by the Deutsche Oper. Could that mean that closing it was considered? Emotions ran high. Saving the Deutsche Oper became a concern. Following negotiations between the City and the Bund (federal authorities), the Bund agreed to take over funding for three other cultural institutions in Berlin, for a total amount of €18 million. In return, the City of Berlin promised to reduce its subsidies to the three opera houses by €16.8 million over 5 years, without closing the Deutsche Oper.

The new foundation (Stiftung) "Oper in Berlin" organizes governance relationships that preserve the independence of each of the three opera houses

Berlin's three opera houses belong to this Stiftung, which was created in 2003 by a Berlin senate law. Sets, costumes and props for all three houses are made in workshops belonging to a single organization called the Bühnenservice. The ballet companies of the Staatsoper and Deutsche Oper were merged to form the Staatsballet, performing alternately in both theatres. A general manager was appointed for the foundation, and he also directs the Bühnenservice.

The Stiftung's decision-making system is very strict. The mayor of Berlin/president of the Stiftung appoints the *Intendant* and *GeneralMusikdirektor* of all three houses. Decisions with financial consequences, whether or not they directly concern the three opera houses, the ballet or the set and costume-making unit, first require a consensus among all members of the foundation's management committee (*Stiftungs Vorstand*), which includes the four *Intendant* and the four *Geschäftsführer* – the four financial officers of the three opera houses and the ballet -, and must then be ratified by the chairman of the board (*Stiftungsrat*), who under the statutes is the mayor of Berlin and happens to be in charge of culture at the Berlin senate. In fact, the functions of the main fund provider and the head of the foundation are currently exercised by the same person.

Strategic decisions are made by the Stiftungsrat, whose six other members are: the senator in charge of finance, four members elected by the Berlin senate and an employee representative. Some members of the opposition pointed out that only one member of the board, Sir Peter Jonas, a former Intendant of Munich's Bayerische Staatsoper, has any skills and experience as an opera house director.

A second crisis paradoxically arose from an increase in funding for each of the three opera houses

The city of Berlin decided to increase funding for the three opera houses as part of the plans for the Staatsoper. In 2007, the Bund and the city of Berlin adopted a plan for the renovation of its buildings.⁵ The stage facilities were showing their age, the buildings were in poor condition and the foyers were too small. Work should begin in 2010 and will cost €240 million: €200 million will be funded by the Bund and €40 million by the city of Berlin. On top of this sum, a further €20 million approximately will be needed to renovate the Schillertheater, which the Staatsoper will use during the renovations until their completion scheduled for 2013. Plans to raise the height of the building and therefore add 400 seats have been abandoned as the project has advanced.

The city of Berlin has undertaken to provide the Staatsoper with an annual subsidy of €41 million, a rise of almost €5 million. This decision went against the cutback policy which has formed the basis and *raison d'être* for the Oper in Berlin foundation. So as not to put the other two opera houses and the ballet at a disadvantage, or, taking a different viewpoint, to bring their funding up to date, they too were granted additional funds: over €5.5 million per year for the Deutsche Oper, over €4 million for the Komische Oper and over €0.5 million for the Staatsballet. The Staatskapelle orchestra would receive a further €1.7 million a year to offer its musicians salaries on a level with the best-paid German orchestras.

At the Staatsoper, this welcome extra funding available from 2008 paradoxically led to a serious crisis due to disagreement over the allocation of the subsidies granted. The *Intendant* Peter Mussbach was in favour of devoting equal amounts to stage direction and to the creation of sets, costumes and props, against Daniel Barenboim, who wanted more resources to be devoted to music.

Presenting a common budget and resolving the internal conflict at the Staatsoper proved impossible, and Peter Mussbach resigned. In the autumn of 2009, the general manager of Oper in Berlin was removed from his post by the mayor of Berlin.

Can we talk of a crisis in respect of the Berlin opera houses situation?

No, say those who believe that the difficulties and episodes arising since 2003 were provoked solely by the city of Berlin's interventionism. There is less certainty on the part of those who understand the city's need to limit or reduce subsidization of opera in Berlin, and are forced to admit that the subsidy cuts policy has been rendered ineffective.

Through a rational approach, the current situation at Berlin's three opera houses raises three very different questions. At first, the Berliners' affection for each of their three opera houses is in fact comparable to the Parisians' attachment to the Palais Garnier. Each house has its own history and traditions, its own artistic and technical teams, its own audiences, and this was the case well before the Berlin Wall went up. Many of the opera house *Intendant* and *GeneralMusikdirektor* have enjoyed or currently enjoy great fame in Berlin, in Germany and worldwide: Götz Friedrich in the past, Daniel Barenboim today. Each of the three houses has strong support in the capital's population. The Opera in Berlin's Stiftung has no clear restructuring action plan, and is permanently under suspicion. The administrative external control exerted on the Stiftung does not handle its strategic issues.⁶

In terms of restructuring, no strategy can be carried out without sufficient resources. The Stiftung is not a very appropriate body for dynamic action. All the clues suggest that in 2003, the aim was to reduce public subsidies, and very probably reduce the number of opera houses to two. Was it realistic to seek to rationalize the artistic activities and operating methods of three opera houses in Berlin, simultaneously cutting their costs and reducing their public funding, while in practice leaving three general managements to operate independently? And without appointing an authority, a person or institution with the power if not to restructure, at any rate to coordinate activities and operating methods, programming, artistic production and marketing for their theatres? Apart from two reorganizations for the Staatsballet and Bühnenservice, the experience of the last 5 years shows that it was not realistic. On 1 February 2009, Gérard Mortier confronted his German friends on this point.⁷ And in a final telling paradox, public subsidies were raised whereas the Oper in Berlin Stiftung was supposed to serve an objective of reducing public funding.

How, then, should the Staatsoper renovation project be considered? The building is in poor condition, the stage and scenery facilities outdated and mediocre, and the acoustics below par for such a prestigious opera. Where is the problem? It is certainly not in the acknowledged

need to upgrade the auditorium, the foyers, the stage and set facilities. There is never any shortage of arguments to justify rehabilitation of an old, possibly dangerous theatre, and they are reinforced by emotional attachment to a part of the national heritage – which is what the Staatsoper is. The contradiction in the project lies in the combination of enormous cost (€240 million)⁸ and a small auditorium size (1,396 seats), which there are no plans to modify. The renovated Staatsoper will enjoy enhanced prestige. But it will be unable to count on an audience comparable to those at Covent Garden, the Liceu, La Scala, the Opéra Bastille or the large American auditoriums to cover a significant part of its operating costs. And ultimately, once the German state and the Berlin senate have spent €240 million on the renovation, how many years will it take before the question of concerted action by the three opera houses arises, with or without the benefit of any architectural solution? More than that, the same rehabilitation scenario might occur in a few years at the Deutsche Staatsoper, built after the Second World War.

These three questions form a strategic equation that the city of Berlin must address for the organization of its operatic life, one of the most prestigious in the world.

Is such a conclusion relevant? Some of our German friends suggested that we should consider the part of irrationality in Berlin's present situation. Global irrationality lies with the sociological patchwork of so many diverse and opposite sensibilities in Germany's capital. There is still some persistent nostalgia of the former East Berlin musical culture, and the Staatsoper as the Komische Oper are part of it. There is probably some pride about what West Berlin opera life was before the reunification of the two cities, and the wish to preserve it by any means. Irrationality lies with the contradiction between Berlin's public debt of €80 billion, the second highest in Germany after Bremen, and the cost of uncertain projects as the Staatsoper. The rebuilding of the Schloss viewed as a part of Germany's historical heritage has though been either postponed or cancelled in the spring of 2010, as part of reducing public spending in Germany, which means that irrationality in Berlin is not a fatality. All of them are part of constructing a new historical image of Berlin, though strongly connected with its past. In this respect, the view exists that no significant reorganization could appear in the Berlin opera houses' panorama before 50 or 100 years. Here, optimism would just be to say that the Stiftung acts as an invisible link between the three houses and might possibly become a useful restructuring tool in the future.

Internal management crises at opera houses: power struggles between managers

Just a few years apart, three opera houses have experienced power struggles between their general managers and their musical or artistic directors: the Opéra National de Paris, 1994–95, La Scala, Milan, 2003–04 and Leipzig Opera, 2005–06.

Power struggles between general managers and music or artistic directors

Before leaving his post as chairman of Opéra National de Paris, Pierre Bergé renewed the contract with conductor Myung Wung Chung for a five-year period. Bergé knew he was to be succeeded a few months later by a new team and that Hugues Gall would be the true manager of the house. The new contract gave Myung Wung Chung the right to programme four operas per season, and have a say in the casting. Chung's acknowledged talent in getting the orchestra back to work was one of the successful aspects of Pierre Bergé's directorship. Neither Pierre Bergé nor Myung Wung Chung could fail to know that the rights awarded to the conductor in the new contract would be challenged by Hugues Gall – who had not been asked for his opinion. The contract had to be approved by the French government, which let it pass. When the time came, Hugues Gall proposed that Chung should conduct at a higher number of performances per season, but give up the prerogatives conferred by Pierre Bergé. The conductor refused and was fired. A public quarrel ensued that ended in a lawsuit, with the court awarding Chung an indemnity. Hugues Gall popularized the motto "Power can be delegated but not shared" and remained sole master on board. For anyone who knew his uncompromising character, this was not a surprising outcome. The French minister of culture could only watch and accept the financial consequences of the court decision. Chung received compensation as if his contract had been cancelled.

At La Scala in Milan, there was a long cohabitation between Carlo Fontana, Sovrintendente and Riccardo Muti, the artistic and music director. In 2003, the stage and set facilities had just been magnificently modernized. Relations with the musicians remained tense. Riccardo Muti attracted unprecedented media attention when, during an orchestra strike, he conducted *La Traviata* from a piano used to replace absent musicians. Relations between the Sovrintendente and the artistic and music director deteriorated publicly. Riccardo Muti was forced to leave at the request of La Scala's board members, which also dismissed Carlo Fontana before the end of his contract. The Frenchman Stéphane Lissner

was appointed *Sovrintendente* after a long recruitment process. These decisive management issues were solved by the board. Lissner then appointed Daniel Barenboim as principal guest conductor.

When Henri Maier became *Intendant* of Oper Leipzig in 2003, the position of *GeneralMusikdirektor* was vacant. Like the mayor of Leipzig, Henri Maier naturally wished that the fame of the *GeneralMusikdirektor* to appoint would be equal to the worldwide reputation of the Gewandhaus orchestra and raise the overall quality of the opera house. The Gewandhaus is not part of the opera house, but the agreements signed under the supervision of the city of Leipzig require the orchestra and its conductor to give a fixed number of performances at the opera house. With the full support of the mayor of Leipzig, Henri Maier actively lobbied to attract Riccardo Chailly. But after he had invited the conductor to join the Leipzig opera's artistic team, the relationship between the two men went downhill. The mayor renewed Henri Maier's contract for 5 years. Shortly afterwards, Riccardo Chailly let it be known that working with the *Intendant* was a problem for him. At the mayor's request, Henri Maier resigned, but continued to be paid under the terms of his contract.

The contexts differ in each of these three conflicts. In Paris, given the sequence of events in time, the outgoing chairman felt totally at liberty to introduce a future division of artistic power between the musical director already in place – Chung – and Hugues Gall, appointed general manager from July 1995. He knew it would not his job to manage this power-sharing arrangement. Pierre Bergé did not check whether the contents of the renewed contract were acceptable to Hugues Gall, who would have to work with it.

The conflict in Milan was a typical clash of personalities and power struggle, with each protagonist seeking to triumph for their own benefit. Each was well known in his own field: Carlo Fontana was considered one of the very greatest *Sovrintendente* of La Scala since the end of the Second World War. Riccardo Muti had a reputation as an unrivalled concert and opera conductor. They had become unable to share responsibilities and power – to work together – in the same opera house. The board members of La Scala drew their own conclusions. Stéphane Lissner, the chosen successor to Carlo Fontana, only agreed to take over on the condition that he would hold full artistic and financial powers. This followed the example set a few years earlier in Paris by Hugues Gall.

In Leipzig, there was probably no future for cohabitation and teamwork between Henri Maier and Riccardo Chailly. At first, Henri Maier and the mayor of Leipzig were convinced that Riccardo Chailly's

appointment was an excellent initiative. Ultimately, Riccardo Chailly forced Henri Maier's departure. The Paris and Leipzig cases share a common factor: high opportunity costs – which are paid by the taxpayers.

Conflict of interests between the city of Geneva and the Grand Théâtre

In the spring of 2006, there was unrest in the Grand Théâtre workshops after the promotion of a staff employee whose style and methods were considered inappropriate. In August 2006 the tension mounted following the suicide of a technician belonging to a different department in the theatre. Nearly half of the 320 members of the Grand Théâtre's staff have the same municipal employee status as Geneva city staff.⁹ Many of them took their complaints to the Geneva city councillor in charge of culture. In 2007, the city gave the Grand Théâtre a subsidy of CHF 29.4 million, almost 63 per cent of its total budget.¹⁰ A first governance conflict erupted. The Geneva city councillor in charge of culture took the initiative of holding meetings with the personnel and union representatives at the theatre, neither with the theatre management nor with the chairman of the foundation board. The theatre's general director Jean-Marie Blanchard asked the foundation board to have an audit carried out. All this gave the impression that Geneva's city council was taking over responsibility for dealing directly with the problem, bypassing the theatre's governance bodies. Audits were ordered, and several of them were made public. Without ignoring any communication problems inside the theatre, none of the audits called into question the overall management or the quality of artistic work at the opera house. Bruno de Preux and Robert Roth, respectively chairman and vice chairman of the Grand Theater's board, resigned in public protest about the methods used. The dominant aspect of this crisis is the link between incidents arising between personnel with municipal employee status, and the direct intervention of the Geneva city management which bypasses the roles and action of the governance bodies and the opera's management itself. The city of Geneva did not renew Jean-Marie Blanchard's contract when it expired in July 2009. It appointed a new chairman and made several changes to the management team. The crisis is now considered settled.

Pamela Rosenberg's time at the San Francisco Opera, 2001–06, and how Gérard Mortier refused the New York City Opera, 2007

The recent histories of these two American opera houses have several common characteristics, despite their differing styles and traditions. In both cases, symbolic, reputed and respected general managers retired

and needed replacements: Lofti Mansouri in San Francisco and Paul Kellogg at the New York City Opera. Lofti Mansouri tended to be conservative in programming, while Paul Kellogg opened up the New York City Opera to baroque opera and showed eclectic taste in his artistic choices throughout his career. The trustees of both opera houses wanted to breathe new life into their institutions. Even before Lofti Mansouri's departure, the San Francisco Opera was suffering from the difficult economic situation in California, made worse by the events of 9/11. The German-American Pamela Rosenberg had worked part of her career in several German opera houses. She was invited to head the San Francisco Opera in November 2000, "to bring the house from the 19th into the 21st century".¹¹ She planned to put on Berlioz's *Les Troyens*, *Le Grand Macabre* by Ligeti, and *Die Soldaten* by Zimmerman. Even before the fateful date of 9/11, Pamela Rosenberg soon realized that the funding position of the house was not as brilliant as she had expected. Were the trustees aware that it had deteriorated? Had they failed to inform her? Nine years later, Pamela Rosenberg is still not really sure. It was the beginning of long months of unanticipated difficulties: attempting to convince donors to continue, if not increase, their contributions, finding new sponsors, convincing people to accept programming and a type of production for which not all the audience was ready, then implementing a cost-cutting policy and dropping several productions! With the help of several trustees, Pamela Rosenberg achieved financial recovery: after a loss of some \$11 million for the 2002–03 season, results were positive for 2003–04 and remained positive for the rest of her time as general director. The total amount of resources earned and contributed increased from \$56 million in 2002–03 to \$61.7 million in 2005–06. True, they increased further to \$70 million during successor David Gockley's first year. Who will ever know how far these results were influenced by a poor economic environment and an artistic programme that marked a partial break from her predecessor's practices? Pamela Rosenberg chose not to renew her contract in 2006.¹²

History did not quite repeat itself when in 2007 the representatives of the New York City Opera asked Gérard Mortier, who was due to end his time with the Opéra de Paris in July 2009, to take over at New York's famous second opera house. The environments appear similar: Gérard Mortier was called in to renew and modernize artistic policy at the New York City Opera, while Peter Gelb, who replaced Joseph Volpe at the New York Metropolitan Opera in 2005, had brilliantly succeeded in the first stages of his artistic vision. But were the New York City Opera board of trustees, presided by Susan Baker, really unanimous in selecting

G rard Mortier? Like Pamela Rosenberg in California after the events of 2001, Mortier was faced with the initial economic effects of the worldwide crisis in 2007. Also, and no doubt to a greater extent than his counterpart a few years earlier in San Francisco, he had to deal with particularly high overheads. Maybe, given Pamela Rosenberg's recent experiences on the west coast, G rard Mortier could not fail to know that there is no comparison between globalization of the negotiation process for a European opera's public funding and the fragmentation of negotiations with a high number of private donors. In November 2008, G rard Mortier decided against succeeding Paul Kellog. The recovery of the New York City Opera is today in the hands of George Steel, after Michael Kaiser, who had worked on planning for the Covent Garden renovation, advised the New York City Opera board of trustees.

2. Social crises or "Meeting Venus"

Istvan Szabo's 1991 film "Meeting Venus" is a clever, pertinent summary of the tensions and social conflicts which were disrupting operations and complicating management at the time in opera houses in certain European countries. An opera house somewhere in a European capital is preparing to stage a production of *Tannh user*. Glenn Close (with Kiri Te Kanawa's voice) and Niels Arestrup as a famous conductor play the production's title roles. The daily difficulties between the conductor, the diva, the management, the back stage staff and the musicians build up to the point that they threaten the premiere to occur. It does in the end take place, but as a concert version. This depiction of a labour relations crisis at an opera house in Europe is reminiscent of the real events of the late 1980s.

In Europe and the USA, the history of opera houses and companies is studded with tensions and conflicts of all kinds – professional issues, labour relations, wages – and crises on varying scales, depending on the time and place, emerging between management and contributors to the operas, that is, the singers, musicians, dancers sometimes and technicians. Lully, the very first director of France's Acad mie Royale de Musique, the ancestor to the Op ra National de Paris, had to face disciplinary problems with his musicians between 1669 and 1680!

The history of opera's divas naturally emphasizes anecdotes of temperamental behaviour that made the news, but things have moved on today. Most opera singers live for and by their art. The vast majority of them are professionals who can get along perfectly well with the people they mix with in the opera houses. Very few become famous for being

difficult, demanding and oversensitive. Joseph Volpe, who headed New York's Metropolitan Opera between 1990 and 2006, opted to deprive his opera house of singer Kathleen Battle's talents rather than give way to her demands. In December 2006, when Roberto Alagna walked off the stage during *Aida* at La Scala because of the audience's hostile reaction to his performance, the management asked him to leave the production.¹³ Such cases remain unusual.

Taking an overview of the history of all opera houses, in the first two thirds of the 19th century the singers' fees were among the largest cost centres of opera houses, companies or occasional producers of operas. As the industrial revolution progressed, generating overall wage rises in all economic activities, musicians, dancers, chorus singers, and then back stage and administrative staff, all traditionally low-paid, in turn demanded pay rises and better working hours and conditions. This brought about deep-seated changes in the format of budgets. The relative cost of musicians, chorus singers, dancers and stage crews began to follow a steady upward trend. Turning points were reached everywhere in the late 19th century or early 20th century. "At the end of the nineteenth century", writes John Dizikes, "the Metropolitan paid orchestral players fifty dollars per week for seven or eight performances, choristers fifteen dollars. Four conductors drew a total of twenty thousand dollars for the year. The company's entire ballet corps collectively received half that amount. At this time, Caruso and Melba each made between two and three thousand dollars a performance, and also took part in strike-breaking" (Dizikes, 1993, p. 526). Dizike recounts how during a performance of *Faust* at the Metropolitan Opera in 1905, the choristers decided to stop singing unless they were given a raise, then describes the turbulent reception given to general manager Heinrich Conried when he came onstage during the first interval to explain his opposition to the singers' demands. A compromise was reached shortly afterwards.

These tensions are solved sooner or later through negotiations. They sometimes end up in open crises. There are several explanations. First, opera houses face the same labour relations and management problems as any firm with large workforces – which is what they are even though their staff often have highly specialist skills. But their specificity also lies in the great diversity of specializations, skills, levels of responsibility and hierarchical levels to be found. In restricted geographical spaces – opera houses, stages, rehearsal rooms, orchestra pits – coexist men and women with highly diverse talents, from the divas to the stage technicians, via the musicians and chorus singers; all have clearly defined roles to play

in production and performance, with widely varying working and pay conditions.

The greater the vertical integration, that is, the greater number of permanently employed people, the greater the associated variety and complexity. The quality, precision and credibility of management play a major role in an opera house's labor relations.

Union's organizations vary from country to country, and from opera house to opera house as the negotiation processes differ across continents, given the social history and traditions of each individual country. They vary greatly, but unions or corporate bodies are present everywhere. Agreements between management and employee representatives can be local, regional or, as in Germany, for example, national in scope. Negotiation is no easier in North America than in Europe, but the comparative duration of agreements has its value. Four-year agreements are not unusual in the USA, where negotiations may be tough but once agreements are signed they are generally respected as long as they are in force. The quality, precision and credibility of management play a major role in an opera house's labour relations.

Unsuccessful industrial negotiations develop into open, public crises when they jeopardize operations or quite simply bring them to a standstill through strikes or a lockout.

In 1980, a conflict between the management at the Metropolitan Opera and the orchestral representatives caused an 11-week closure. The management had given its consent in principle to the orchestra's negotiators for reduction of the mandatory number of weekly performances from five to four, but then went back to its initial position. The stalemate was such that the management decided to close the opera house until an agreement was reached. Joseph Volpe has told the tale (Volpe, 2006, pp. 82–91) of how he came to be the management's chief negotiator even though his responsibilities did not cover relations with the orchestra. Unusually, the then US President Jimmy Carter designated a federal mediator, Wayne Horvitz, to help find a solution. The initial consent by management was confirmed and the musicians agreed to an extra four hours of rehearsal time per week. The season opened on 10 December with Mahler's second symphony: Volpe takes care to remind his readers that "Resurrection" is the subtitle of this symphony.

Twenty years later in Paris, strikes prevented over 30 performances from taking place or taking place in normal conditions, in the specifically French context of the move to a 35 working hours per week new public law. The year 2000 had got off to a good start for the orchestra "the most important man in opera", as Hugues Gall used to say, then for

the ballet and the chorus who received improved wages following the pay rises that had been awarded to the choirs and orchestras of Radio France. This led all the other categories of personnel to seek new benefits in terms of working hours and pay. The government appointed a mediator, Daniel Lejeune, and an agreement to end the crisis was reached on 21 December 2000. It was to cost €10 million (Agid and Tarondeau, 2006, pp. 240–2).

3. What do we learn from these crises?

Many among the described crises have had positive results

At the Opéra National de Paris, the 1989–94 crisis ends up with an in-depth reshuffling of the previous and negative interferences between the opera house and the national state administration. It becomes clear that from 1994, there is only one boss in charge of the house, and management professionalism becomes the key word. After the Hugues Gall era, this vision and the newly designed by-laws are equally well received by Gérard Mortier and, today, by Nicolas Joel. At Covent Garden, the board of trustees is more than ever aware of its overall strategic responsibility on the Royal Opera House future, and this is solemnly written in the annual review 2007–08. The different entities of the Royal Opera House are now under the board's full responsibility. Never again should negative events of the sort of the 1995–97 period ever occur. At La Scala, the board decided to put an end to the Sovrintendente/musical director conflict and offered full artistic and financial responsibilities to Stéphane Lissner.

Lack of forward planning is a frequent and decisive cause of crisis

This is one of the major explanations for crisis situations in opera houses. While at the Liceu after 1994, at Covent Garden in 1995 and at La Scala after 2002, the time required for renovation work was assessed realistically and the schedule was respected, in London the agreements for the alternative venues to be used during the closure were signed too late. This lack of forward planning triggered a series of consequences that led to a financial crisis, and before long a governance crisis. In Paris, many of the aspects of opening the new Bastille opera were not anticipated: they included teething difficulties with the new stage technologies, the running costs of stage and scenery facilities, division of roles between Opéra Bastille and Palais Garnier, the need for stable,

professional organization, and the emergence of labour tensions that were costly to resolve – all on top of governance problems.

The strictly financial aspect of these crises is often spectacular – but it is more a reflection of the lack of forward planning than a cause in itself. However, disrupted environments such as that of the period following the events of 9/11 in the USA, or economic crises such as the one that began in 2008, can have a significant effect on opera house funding – no doubt more so in North America than in Europe.

Construction and reconstruction of new theatres and new stage facilities are central to several European crises

The size and design of the auditorium/stage areas exert major influences on artistic, commercial and financial issues of an opera house or company. At the Liceu, Covent Garden, and La Scala later, it was decided to design and completely rebuild the stages and back stage areas with new technologies that increased productivity. All three auditoriums were preserved in their original form, but repainted, redecorated and air-conditioned. As luck would have it, they were sufficiently large for commercial operation to be viable. In Paris in 1989, there was no explicit political choice to locate all opera production activities at the new Bastille theatre, but the scale of the ballet company's activities justified keeping the ballet at the Palais Garnier. In 1994, Hugues Gall proposed a compromise of presenting opera and dance in both theatres. In Lyon in the early 1990s, reconstruction of a new opera house, adding an attractive external architecture but making no changes to the dimensions of the stage and auditorium, is now seen to be inappropriate: the stage lacks back stage and wing space, and the auditorium is notorious for being too small. Doubt exists about the future seating capacity of the Berlin's Staatsoper to be rebuilt between 2010 and 2012.

Governance effectiveness is nearly always a problem

Weak governance bodies have difficulty in preparing for changes considered necessary, and this is where we find a lack of forward planning; serious crises then reveal their weaknesses. Conversely, strong enough governance methods and responsible managers/board members or trustees can turn awkward situations around.

In Europe, it is quite normal for crises to be settled by the city administrations or regional or national authorities, regardless of whether the opera houses have their own governance bodies. At the Royal Opera House, the authorities did not merely appoint new managers, they

required a complete change of board and management. The Covent Garden crisis of late 1998 is unusual in the creation and role played by the Parliamentary Select Committee, its powers of investigation and its freedom to make recommendations.

The rules of the game are different in France and Germany. In Paris between 1989 and 1994, and in Berlin since 2003, political leaders – the government in France, the mayor and the Berlin Senate in Germany – have had the power to appoint opera house managers because of their crucial involvement in funding. The main evolution in the Opéra National de Paris crisis-solving process of 1994 was not only for the government to choose a professional new director, but also to accept the new governance rules he proposed. Would these new rules not have been accepted, Hugues Gall would have refused the Opéra National de Paris management. In Leipzig, the mayor settled the conflict between Henri Maier and Riccardo Chailly. In Berlin, the future is open.

In the Geneva Grand Théâtre crisis, two issues have to be considered separately. One was the interference between the foundation board's and the city of Geneva's responsibilities in managing the conflict. This interference is supposed to be overcome. The other is the existing and remaining situation created by a part of the staff under a city status when the other part is managed under the foundation's own rules. Similar examples exist in different European countries.

In the American opera houses, the boards rule supreme. Intervention by a Parliamentary committee, a government or the federal state would appear pointless today although cities, states and the federal state itself are attentive to crises (the New York Metropolitan in 1980, Los Angeles Opera in 2009–10). In the USA, prevention and management of crises depends on the trustees' judgement and management qualities, often on their unity, sometimes on their doubts.

Communication on crises in opera houses unsurprisingly directs the spotlight at their managers. The end of a crisis almost always coincides with the appointment of new managers, who are handed these *édifices complexes* and expected to put the house in order.

9

Performance, Strategic Options and Prospects

Opera is the most costly of the performing arts, and the one with the most restricted audience. The number of opera houses and companies currently in existence is very large (several hundred), and they are very diverse. We have already reviewed the activities and policies of opera houses; it is now time to attempt to understand their performances, and then to examine some detectable prospects for development. Whether large or small, of international, national or local renown, publicly or privately funded, all opera houses and companies need public subsidies or private contributions to supplement their internally generated “earned income”, which essentially derives from sales of tickets and productions. Their financial autonomy, or earned income as a percentage of the total budget, varies from 6 per cent to 47 per cent; the rest, or “contributed income”, comes from external sources. Public backers justify their contributions in terms of one or more public interest objectives: preserving or developing the artistic heritage, making culture accessible, or reasons of prestige and reputation. In the USA, private donors are asserting their attachment to the art form of opera, and their chief expectation is that their money will enable opera productions that would probably not exist without their involvement. They also expect positive returns in the form of publicity, personal profile-raising and public image. Private donations in Europe are driven by the same motives, despite a lower relative importance than in North America even though their marginal value remains high. In either case, the quality of the opera offering as reflected in the audience response is what justifies the financial support provided. The seat occupancy rate, which in our database ranges from 45 per cent to 98 per cent depending on the opera house, reflects the perceived quality of opera productions and how well they match their environment. This rate can attract long-term commitments from financial partners or lead to withdrawal of their support.

A statistical model has been developed to attempt to explain opera house performances on both these aspects. But assessment of opera houses' performances cannot be restricted solely to the two quantified indicators of financial autonomy and seat occupancy rate. Quality is a constant concern and a key ambition of opera house managers. Opera house quality cannot be satisfactorily examined without reference to subjective judgements by experts and spectators, which for that matter are not always concordant (Boerner and Renz, 2008). Performance evaluation must also take into consideration the definition of opera houses' missions and cultural policy objectives: this results from their history, funding conditions and sources, and any local environmental factors (Turbide and Laurin, 2009). As such cultural policy options cannot always be expressed in figures, another approach has been applied, broadening the analysis to include several qualitative factors. This second approach is based on understanding the conditions or justifications that are often attached to public subsidies and private donations. The results of the two approaches sometimes conflict.

Once we have examined and understood opera houses' current policies and the factors that explain their performances, we will try to assess their future prospects.

1. A quantified explanatory model of opera house performance

A database containing key figures for almost 70 opera houses and companies from the American and European continents has already provided comparisons illustrating various chapters in this book. We could have merely compared the respective portions of earned income in the opera houses' budgets, and the seat occupancy rate in their theatres. We decided to go further and seek to identify the key influential parameters and variables, and their relative affect on the degree of financial autonomy and seat occupancy rate, in order to learn from them.

Positioning of opera houses

In the matrix constructed using the two indicators selected, opera houses can be classified schematically into four groups or quadrants.¹ The north-west quadrant contains high-performance houses like the Chicago Lyric Opera, the New York Metropolitan Opera, the Los Angeles Opera and Covent Garden in London. In the south-west quadrant are opera houses with comparatively low financial autonomy and occupancy, for example, Athens Opera, Leeds Opera North and the Leipzig

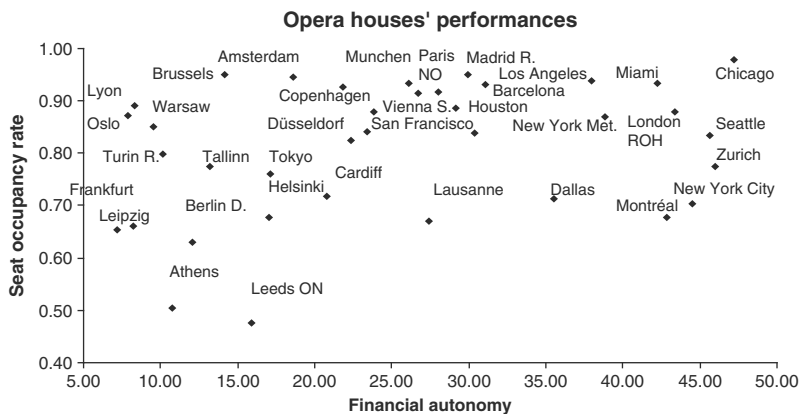


Figure 9.1 Opera houses' performances

Opera. Opera houses that play to full houses and are highly dependent on external financing, such as La Monnaie in Brussels, the Opéra de Lyon, Amsterdam or Oslo are to be found in the north-west quadrant. The houses in the south-east corner, including the New York City Opera, Montreal, Dallas and Geneva's Grand Théâtre, achieve financial autonomy despite comparatively low seat occupancy rates (Figure 9.1).

Statistical explanation of the performances observed

The statistical explanation of the positioning observed is based on a simple model where performance criteria result from the policies implemented – artistic and production policy – and environmental factors.

Figure 9.2 shows the list of variables taken into consideration.² The construction method for the model developed and the resulting figures are presented in Appendix B.

Some of the variables in the model have no statistically significant effects on the performance criteria. In the artistic policy factors, this is the case for programming conformity; in the production policy factors, the variables that measure diversification and networking, that is, co-productions and production rentals; and in the environmental factors, per capita gross income. These observations require explanation.

Any opera house general manager considers the choice of works to be performed as the key strategic decision of the job. And yet statistical analyses show that these choices have no significant effects on either the

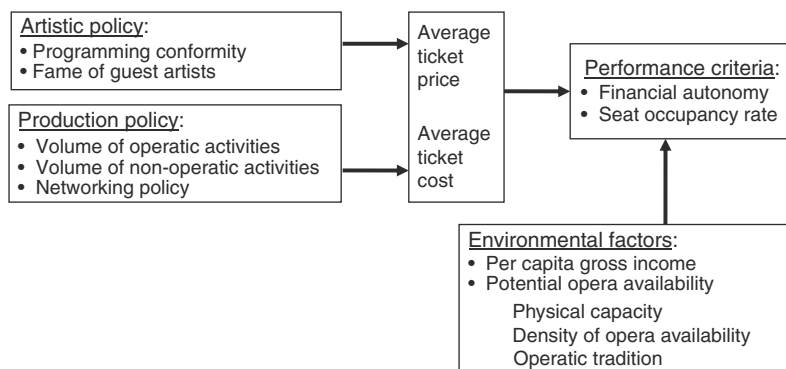


Figure 9.2 The performance explanation model

intermediate variables of ticket price and cost per ticket or the managerial performance criteria of financial autonomy and the seat occupancy rate. This by no means indicates that all works generate the same levels of production or performance cost, nor that they are all equally attractive to audiences. But across a whole season, all opera house programmes offer a broadly similar mix balancing popular works from the major creative periods of the 19th century such as *Lucia di Lammermoor*, *Carmen* or *Rigoletto* with less well-known works or contemporary operas such as Lachenmann's *Das Mädchen mit den Schefelhölzen* (*The Little Match Girl*), Dusapin's *Faustus* or Carlisle's *Of mice and Men*; the most costly works to produce, such as Prokofiev's *War and Peace* or Wagner's *Götterdämmerung*, with less costly works such as Verdi's *La Traviata* or Gluck's *Orpheus and Eurydice*. Figures extracted from the Operabase website show that, in our sample's 70 opera houses, just 10 per cent of the 336 operas performed during the 2006–07 season accounted for 50 per cent of all public opera performances. This concentration on a small number of operas together with alignment on the classics neutralize or mitigate differentiation strategies, and obscure their possible impact on live opera performance. The dynamics of this concentration of offerings combined with the small audiences for contemporary works deserves further investigation.

The degree of diversification of artistic activities appears to be a factor of discrimination between opera houses and companies. There is an immediately striking contrast between the American opera houses and companies, which are almost always devoted entirely to opera, and the European houses which are often diversified, staging dance (in some cases having their own ballet company), orchestral concerts and

occasionally plays. The non-significance of this variable does not mean that the diversity of activities has no influence on the few remaining houses where dance activities, for example, still have an important role. This is the situation at Covent Garden and the Opéra National de Paris, where dance brought in 37 per cent of total box office income for the 2006–07 season. Across the whole sample, two explanations are possible for this low significance: the small number of opera houses with a high volume of non-operatic activities, and above all the low impact of these activities on budgets and costs, especially when they are outsourced.

Network productions are currently on the increase, with the particular aim of reducing production costs for each partner. This does not appear to be statistically significant in our analyses, but requires further investigation.

Per capita gross income, which is statistically linked neither to the ticket price nor the ticket cost, presents a particular difficulty: in each country where our opera houses are located, the per capita GDP figure is national, not reported by city or region.

While the quality of performances and productions cannot be expressed in terms of figures, their appeal is incorporated into our analyses through inclusion of the quantified impact of artist fame, and the financial autonomy and seat occupancy rates.

Principal results

The total effects of the explanatory variables for opera houses' managerial performances are presented in Table 9.1. The standardized total effect of the column variables on the row variables are measured by standardized regression coefficients comprised between -1 and $+1$ which express the direction and intensity of the relationship between a causal variable such as "seating capacity" and its effect such as "financial autonomy". In this case, the strength of the relationship, measured as 0.458, is positive and very significant.

First, let us look at the cells containing non-significant results. As expected, ticket price and ticket costs show no significant statistical relationships. Number of opera performances and ticket price are not related. Surprisingly, high artist appeal which implies high fees does not increase ticket cost significantly and high ticket price does not deter people from buying tickets – provided of course that opera houses' overall budgets are large enough to afford well-known artists.

Financial autonomy increases as the average ticket price rises and the full cost per ticket declines. This is not a surprising finding, as it corresponds to the definition of financial autonomy.

Table 9.1 Performance explanation factors

By On	Operatic tradition	Seating capacity	Fame of artists	Number of opera performances	Ticket price	Ticket cost
Ticket price	n.s.	0.443	0.262	n.s.	–	n.s.
Ticket cost	0.349	–0.432	n.s.	–0.341	n.s.	–
Financial autonomy	–0.086	0.458	0.082	0.085	0.312	–0.248
Occupancy rate	–0.088	0.109	0.578	–0.229	n.s.	–0.251

Note: n.s.: Non-significant at 0.05 per cent.

The potential opera availability influences financial autonomy in three ways, two indirect and one direct. It encourages higher ticket prices, presumably due to low local opera availability or the low intensity of local competition. It tends to reduce full costs per ticket due to large physical capacities. Finally, it has a direct influence on the intermediate variables of ticket price and cost per ticket, although it cannot be statistically linked to them.

The number of opera performances exerts an indirect effect on financial autonomy. Increasing the number of performances leads to a reduction in the cost per ticket and an increase in financial autonomy.

While we might have expected high prices to deter some theatregoers, leading to a lower seat occupancy rate, the average ticket price is not statistically significant in the model. Does that mean there is no price elasticity in opera demand? Programming conformity also has no significant effect on the seat occupancy rate. However, the fame of guest artists has a strong influence on the seat occupancy rate, independently of ticket prices and the popularity of the operas programmed. A high number of performances helps to improve financial autonomy but may have an adverse effect on the seat occupancy rate. The potential opera availability has an indirect effect through the intermediary of costs per ticket.

Presenting well-known artists has positive effects on financial autonomy without putting significant pressure on costs, causing improvements primarily in seat occupancy rates. The number of performances and productions per season increases financial autonomy slightly, but may have an adverse effect on seat occupancy rates. In fact, opera houses' financial performances are essentially explained by favourable factors in the local environment. The potential opera availability

provides most of the explanation for the houses' financial autonomy, and helps to explain their seat occupancy rate. An analysis was carried out using the variables involved in the construction of the "potential opera availability" factor, rather than the factor itself. It shows that the physical capacity provides most of the explanation for financial autonomy. An environment marked by a strong operatic tradition may generate high costs and lower financial autonomy. The physical capacity helps to increase the seat occupancy rate, which is lower in environments with a strong operatic tradition.

These results bring out some apparent paradoxes.

The first concerns the artistic policy. While existing programming has no statistically significant effects on economic performance, the choice of guest artists has a decisive influence on seat occupancy rates. The most famous artists fill theatres, and contrary to widespread belief, they do so without causing a significant increase in costs provided that opera houses have the financial means and economic justifications to afford them. Their power of attraction makes it possible to apply higher prices, and also improve financial autonomy. Large opera houses' communication policies emphasize the world-famous guest artists they cast.

Second paradox: the average ticket price has no effect on the seat occupancy rate. This is not to deny that opera house price policies have an effect: they can help to attract certain segments of the public, such as underprivileged and young people, and help overcome audience reluctance to see little-known or contemporary operas. But while these policies have an influence for a limited number of opera performances or a marginal section of an opera's audience, they make little difference between opera houses across an entire season.

Third paradox: by and large, the best occupancy rates are reported by the largest auditoriums. The largest theatres are generally located in environments with high potential opera offering, that is, zones in which opera availability is low compared to the potential audience. This can be illustrated by comparing the opera on offer in Berlin with its three theatres (respectively offering seating capacities of 1,865, 1,270 and 1,396) and at the Los Angeles Opera which has 3,200 seats. The three Berlin opera houses have one opera ticket on sale for every five inhabitants of the greater Berlin area, while Los Angeles has one ticket on sale for every 50 inhabitants. In proportion to the potential audience, opera availability is ten times greater in Berlin than in Los Angeles. It is hardly surprising that the Los Angeles Opera's seat occupancy rate of 94 per cent is higher than the weighted average occupancy rate of

68.4 per cent observed in Berlin opera houses in 2008. The coexistence of three opera houses in the same city causes rather high competition that limits box office income, while excessive availability adversely affects seat occupancy rates. This reflects the effect of a longstanding operatic tradition. In areas where opera experienced its earliest and most glorious developments – Germany is one of them – the density of opera availability is considerable, and it is generally dispensed through relatively small theatres that are part of the cultural heritage. In contrast, in areas of the world where opera was introduced more recently, the density of opera houses is lower but their seating capacity is larger and the number of performances is lower. These theatres display higher seat occupancy.

Some results escape this paradox and are completely consistent with existing theories. Economies of scale play their allotted role perfectly. The greater the production volume, the larger the theatres and the lower the total cost per ticket. The effects of “Baumol’s law” (Baumol and Bowen, 1966) can also be observed: this law states that performing arts institutions lose their financial autonomy as their relative productivity declines. While all opera houses have experienced a decline in relative productivity, all other things being equal, those with large auditoriums have better productivity – resources consumed per ticket sold – than those with smaller auditoriums. Their financial autonomy should therefore be higher. This is confirmed by the statistical analyses.

The results show that history has a considerable though paradoxical influence on opera houses’ structures and strategies especially, which can be explained by a few major reasons that have been reviewed in the previous chapters. Though there is no unique European nor unique American model of opera houses, some historically longstanding European features have their importance, such as the people’s attachment to the symbolic value of their opera house’s architecture and location; as in Lyon or Berlin, they are often reluctant to consider any change. The average small capacity of their auditorium limits box office revenues. The density of opera availability is higher in places where opera is an older tradition, more soundly established in society. This leads to highly intensive competition that also limits box office income, while excessive availability adversely affects seat occupancy rates. The weight of their fixed costs goes hand in hand with the historical existence of full-time orchestras and choruses. To respect tradition and keep it alive, a long-established opera house very often ensures it has control over all the resources and skills needed for artistic production and performances. Where the operatic tradition is

strong, the specialization-based explanation can be extended to most other resources used by an opera house, especially technical. Companies under less pressure from tradition, on the other hand, incorporate only some of the resources and skills they need, and acquire complementary skills on the market.

2. Influence of the conditions underlying contributed income

On both continents, the model's two indicators deduce instant information on opera houses' degree of strategic dependence on the contributed income they attract. However, the table in Figure 9.1 gives no indication of what is expected in return for additional funding, public or private, or of the relative proportions of each type of funding. The analysis should introduce, or reintroduce, the missions assigned to opera houses by their managers or governors in parallel to the additional funding received.

Whether public or private, the funding received in addition to earned income often comes with attached missions, conditions and explicitly or implicitly expected returns. The greater the value and percentage of contributed income, the greater the opera house's strategic dependence on the people or organizations that make up the difference between earned income and the overall operating budget. European public funding comes with more constraining conditions than funding from private donors in the USA, because it is more general and accounts for a much larger share of the opera houses' budgets. In practice, several of the conditions observed are similar on both sides of the Atlantic.

Most of them in Europe, but also in the USA, primarily seek to set the number of performances, new productions and revivals, and to extend diffusion of the operas produced. The desire to make opera more "accessible" is a longstanding concern almost everywhere in Europe. The still widespread traditional German model is one of the clearest examples of this: the average ticket price ranges from €8 to €50, and price ranges are highly diversified, with concessions for charitable organizations, students and senior citizens. The tours that were so popular in the 19th century in Europe, North America and South America still survive in places. In the UK, public funding for tours is one of the types of support provided by the Arts Council England, Wales and Scotland. La Scala in Milan and the Teatro Regio in Turin, which present most of their artistic activities on the main stages, take productions on tour in smaller nearby towns and their regions for some 20 performances of two to four popular operas, sung by lesser-known artists than those who perform at

the home theatres. Whenever an opera house performs in a venue other than its main stage, it legitimizes at least some of the aid received from public sources.

Foreign tours by the major opera houses, which are rarely 100 per cent self-funded, establish the prestige and image of the opera companies and of their home cities and countries, and sometimes lead to beneficial partnerships. During the 2009–10 season, the Opéra de Lyon and the Turin Teatro Regio performed some of their productions in North Europe and Japan. Covent Garden welcomes Chinese artists and troops and cooperates with the new Beijing Opera. Every year, the ballet companies at the Opéra National de Paris and Covent Garden dance in one or more countries on all five continents.

Methods differ in the USA, but there is still a desire to bring artistic activities to a broad audience. In several houses of all sizes, from the New York Metropolitan Opera to Houston's Opera of the Heights, private donors have recently given amounts equal to the highest ticket prices so those seats could be resold to students at a price of around \$20. Radio or television broadcasts are sometimes among the requirements of the providers of public and private funding. In the UK, France and Italy, the same government authorities and national agencies provide public subsidies to opera houses and public TV channels, obliging them to cooperate so that public money is used for opera broadcasts, particularly on television. Despite the complex practical arrangements and the funding difficulties, and the public TV channels' hesitancy to broadcast operas in primetime hours, this policy is really succeeding. The opening nights at La Scala and several performances at opera houses ranging from the Dresden Semperoper to the Copenhagen Opera are broadcast live every year by the French-German TV channel Arte. In the USA, the Public Broadcasting Service has shown several operas recorded at the Metropolitan Opera since 1977.

Funding with an incentive to engage in co-productions, that is, share production costs between several houses, are part of the move to improve opera houses' cost-effectiveness: produce for a lower cost, and perform a higher number of more widely disseminated operas. This is so obviously a good idea that houses with a small number of productions and performances need no financial incentives to do so. It is becoming natural in France, where close to half of opera performances are co-productions. But as we have seen, this approach cannot work miracles in itself: to generate substantial savings, co-productions must be well negotiated and carefully planned.

Contributed income is also directed in Europe and the USA into composition, production and performance of new works. Before 1939, performance of a defined number of newly composed operas by national composers was one of the obligations of the general manager of the Opéra de Paris, in return for the overall public funding from the state. If it failed to comply with this requirement, the Opéra de Paris had to pay a predefined penalty. Times have changed. Aid for new operas continues, in various forms. Sometimes opera houses commission works directly from composers in residence, a role occupied by Peter Eötvös and Philippe Boesmans for several years at La Monnaie in Brussels; sometimes subsidies are awarded for the purpose by public foundations. The National Endowment for the Arts and the Andrew Mellon Foundation play a decisive role in this field in the USA. These forms of aid have a common characteristic: as in the past, on either side of the Atlantic they chiefly benefit home country composers. In this area, globalization has not yet made much headway.

Certain types of support and conditions are even more clearly intended to encourage joint ventures. Should this too be seen as an ambition to increase coverage? Or to force restructuring? Or both at once? In Germany, Düsseldorf and Duisburg joined forces to form the Deutsche Oper am Rhein, which receives funding from and produces operas in both cities. In France, the cities of Strasbourg, Mulhouse and Colmar merged in 1970 to form Opéra du Rhin. Angers and Nantes have united their efforts for the last 3 years in “Angers Nantes Opéra”, a single opera house for two cities. As we have seen in Chapter 8 on crises, the Berlin Senate’s intention, announced in 2003, to reduce funding for the German capital’s three opera houses led to the creation of a foundation and a strategy which has not so far achieved its initially decided objective of limiting public subsidies. The Angers-Nantes and Berlin projects are not comparable in view of their very different volumes of activities, catchment areas and operatic traditions. Their only probable common factor is psychological, lying in the need to reduce costs, mobilize people and forces, deal with sensitivities and reduce personal ambitions that are not conducive to good teamwork.

3. Understanding the strategic positioning of opera houses today

Positioning results from the model constructed to explain the two indicators of financial autonomy and seat occupancy rate, and from the

conditions or justifications underlying the funding provided in the form of public subsidies or private donations.

Comparative strategic positions of several opera houses

We shall now examine the strategic positions of a few opera houses. Some have shared information and reflections with us, relating them to conclusions from the statistical study and the conditions attached to contributed income.

The north-west quadrant

We first focus on a few characteristic features of opera houses in the north-west quadrant, which have high occupancy rates but more uneven levels of financial autonomy (Figure 9.3).

Three national capitals, Amsterdam, Brussels and Oslo, and two large regional cities, Lyon in France and Turin in Italy, each have opera houses dating back to different periods: the late 17th century (Brussels), the 18th century (Turin), the 19th century (Lyon) and the 20th century (Amsterdam and Oslo). The operating budgets of these houses are comparable in scale: for 2007–08 they ranged from €33.3 million (Amsterdam) to €43.4 million (Brussels), €48.3 million (Lyon) and €50 million (Turin). They are not perfectly comparable, because costs are not all equally visible.³ Their programmes, very different in the detail, all seek a balance in terms of the numbers of performances of very popular and lesser-known operas, between the old and the new. These opera houses prefer to engage up-and-coming artists, who have less of an international reputation and are therefore cheaper, and occasionally call on famous singers and conductors during the season. Every season, the Nederlandse Opera d'Amsterdam (DNO) can call on the services of the Concertgebow orchestra and its resident conductor for one production. Famous artists are cast for the title roles. These houses staged between

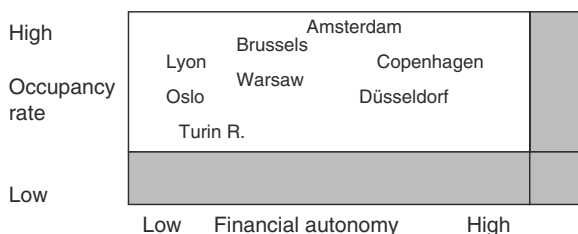


Figure 9.3 The north-west quadrant

96 and 110 opera performances during the 2007–08 season, but the audience they reached varied by a factor of 1–3: 44,000 spectators per season in Lyon, 91,000 in Brussels, 135,000 in Turin and 149,000 for the DNO. The average ticket prices varied from a factor of below 1–2: €40 in Lyon, €55.40 in Brussels, €57 in Turin and €65 in Amsterdam. The average seat occupancy rates for these opera houses and companies in 2007–08 ranged from 81 per cent in Lyon to 90 per cent in Turin, 94.5 per cent in Amsterdam and 96 per cent in Brussels. Financial autonomy (the percentage of earned income), which stands at 8.3 per cent for Lyon, 14.2 per cent for Brussels and 18.6 per cent for Amsterdam, automatically means that an average 80 per cent of the budget must come from contributed, mainly public, income. While local audiences for opera from Oslo to Turin doubtless have their own particularities, the theatres used by each of these opera houses probably form the most decisive factor of differentiation that explains their financial results. Several opera companies are housed in theatres with a small number of seats and stage facilities offering only limited opportunities for alternation of production and set storage. This is the case at the Théâtre de la Monnaie in Brussels (1,150 seats) and the Opéra de Lyon (1,095 seats, although it was completely renovated in the early 1990s). Bernard Focroulle regrets the insufficient capacity of the Théâtre de la Monnaie (Focroulle, 141), and Serge Dorny, director of Opéra de Lyon, believes he would do better with 600 more seats. Conversely, Turin's Teatro Regio, which was destroyed in 1936, rebuilt from 1966 and inaugurated in 1973, has a larger capacity of 1,592 seats, and has modern stage equipment, but its directors would be happy with an auditorium seating 2,000–2,200. The same applies at the DNO (1,650 seats) used by Het Musiektheater, inaugurated in 1986. In terms of financial autonomy, these two theatres have higher scores than the Brussels and Lyon operas – but the Théâtre de la Monnaie in Brussels has a higher seat occupancy rate than Amsterdam's DNO. The intermediate indicators of average ticket price and number of spectators per season are coherent with these results. Regarding the conditions attached to contributed income, there is a constant link in all locations between a concern for accessibility, reflected in modest average prices, and the percentage of public subsidies. Attention to production costs is also noticeable, partly reflected in a large number of co-productions.

The south-west quadrant

In the south-west quadrant of the matrix, and thus with lower financial autonomy ratios and seat occupancy rates, are a large number of

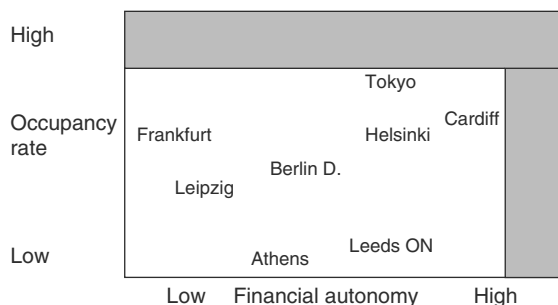


Figure 9.4 The south-west quadrant

European opera houses with budgets generally ranging between €10 million and €50 million (Figure 9.4).

This quadrant contains a large share of the German opera houses, and also the British houses of Leeds and Cardiff. In Germany, Erfurt, Mainz and Lübeck opera houses are representative of medium-sized or small formats: total audience numbers for the 2007–08 seasons vary from 36,000 in Mainz and 44,000 in Lübeck to 61,000 in Erfurt, including 23,700 during the open air festival. Financial autonomy stands at around 20 per cent and the seat occupancy rate is between 60 per cent and 80 per cent. A total of 67–80 performances are staged each season, of some ten different operas. These figures are, incidentally, comparable to those for the Lyric Opera in Chicago, which had 273,000 spectators over the season – almost five times as many. This is typical of the traditional German model. The average ticket price of €7.50–€15 is a clear indication of the desire to make the opera theatre accessible to a very broad audience. Guy Montavon,⁴ general manager of the Theater Erfurt, stresses the theatre's role in the town as a medium-sized business. It employs more than 200 people and its singers are well known and appreciated locally. The theatre was entirely renovated in 2005, and with its attractive 900-seat auditorium and ultra-modern stage facilities, it is part of the social and cultural heritage that is precious to the town. Many German towns can put forward similar arguments, although not all have recently renovated theatres.

The Rhurgebiet area of the North Rhine-Westphalia Region has approximately 11 million inhabitants, making it the fourth largest urban zone in Europe in terms of population, behind London, Moscow and Paris. It has seven opera houses, with a combined capacity of 6,884 seats, plus the Ruhr festival: the total audience in the 2007–08 season was 539,000 spectators for 638 opera performances.

Table 9.2 Key figures in the Ruhrgebiet, Germany 2007–08

Opera houses (most of them diversified)	Available seats in each theatre	Audience	Number of performances in the main theatres	Earned income against public subsidies (%)	Total budget (€ million)
Düsseldorf	1,306	109,000	116	24.6	38.5
Duisburg	1,069	51,500	70	5.26	3.8
Essen	1,225	111,000	108	21.22	44.3
Gelsenkirchen	1,008	39,676	52	17.34	12.4
Hagen	784	31,800	65	16	11.9
Dortmund	1,170	51,800	80	13.7	32.7
Köln	1,330	144,000	147	19.38	48.5
Total	7,892	538,776	638	18	192.1

Source: *Deutscher Bühnenverein Theaterstatistik 2007–08*.

As Table 9.2 shows, financial autonomy at these opera houses is around 18 per cent. The highest ratios are found where the audiences are largest. The key figures for the Ruhrgebiet opera houses show clear convergence with the conclusions of the overall statistical analysis. The three largest capacity theatres in Köln, Düsseldorf and Essen stage the largest number of performances and are also those with the highest level of earned income. Ticket prices are particularly low. The dominant pre-occupation is accessibility. In Düsseldorf and Duisburg, the Deutsche Oper am Rhein company runs the opera houses in both cities.

The situation in Berlin reflects a colossal problem in geographical terms. The three opera theatres in the capital – Staatsoper Unter den Linden, Deutsche Oper and Komische Oper – all have a long, prestigious history. All three depend on the same Berlin Senate for financing, and now find themselves competing in the same space for public subsidies of over €100 million. As previously mentioned, Berlin has the considerable, not to say excessive, availability of one seat at the opera for every 5 inhabitants, compared to one for every 12 inhabitants in London, 15 inhabitants in New York and 50 inhabitants in Los Angeles. In 2007–08, the seat occupancy rates were 82.9 per cent for the Staatsoper, 64.5 per cent for the Deutsche Oper and 62.2 per cent for the Komische Oper. The average occupancy at the three theatres for all types of performances was 72.5 per cent. The Staatsoper more often engages experienced international artists than the other opera houses in its quadrant. Its average ticket price is noticeably higher. The very low capacity of its auditorium explains the low financial autonomy, which is not improved by its occupancy rate.

In the UK, the regional companies Welsh National Opera (WNO) based in Cardiff, and Opera North based in Leeds were both created after the Second World War and have low financial autonomy and seat occupancy rates, on a level comparable to those of medium-sized German opera houses. Their strategies are radically different. Both exist to take productions touring to the cities in their regions: that is the condition underlying the public funding they receive, and they would find it difficult to survive without such funding. In 2008, the WNO gave 34 performances in Cardiff, where it shares use of the Millennium Theatre opened in 2004, and 73 more performances in some ten cities in Wales and south-west England. The corresponding figures for Opera North are 47 performances in Leeds, and 66 in neighbouring cities. The main auditorium size is less significant than the average for all theatres used for performances, estimated at 1,300 seats. In 2008, budgets reached €22.3 million for the WNO and €15.2 million for Opera North. Both companies are involved in co-productions, on different scales, with partners partly chosen for their similar-sized stages. At the WNO co-productions are a major component of production policy, and investments have been made in large, partly independently managed workshops to make sets, costumes and props. Of course, this actually generates income, even if it is on a modest scale. The full cost per performance for the WNO is around €200,000, among the lowest in Europe. Both these companies have tightly managed budgets. They often suffer from low occupancy rates in their touring venues, but for a modest outlay of resources they keep opera alive and well in their catchment areas.

The south-east quadrant

Two very famous opera houses lie in the south-east quarter of the matrix: the Zurich Opera and the Grand Théâtre in Geneva. The Zurich Opera has a financial autonomy score of 46 per cent, close to that of the best American houses, for an occupancy rate of only 78 per cent. Its 1,100-seat auditorium is modestly sized. The high box office income is partly explained by the large number of opera performances (more than 200 per season), ballets (60) and concerts (70). The average ticket price for opera was €170 during the 2007–08 season – double the average price charged by the Grand Théâtre and three times the average price for all opera houses studied. In 2008–09, prices ranged from €12 to €380. Such high prices are possible due to the very famous guest artists, the wealth of Zurich city and district and the strong operatic tradition in this German-speaking area. The guest conductors and singers are among the most renowned in the world (Figure 9.5).

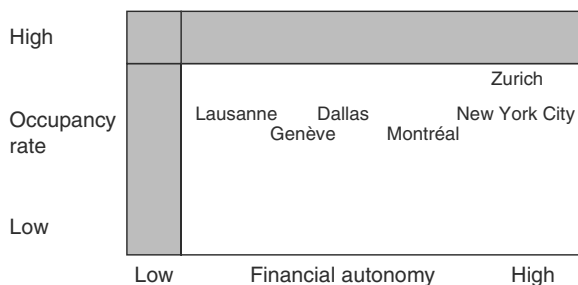


Figure 9.5 The south-east quadrant

The relatively low seat occupancy rate could be explained by an over-abundant offering. Opernhaus Zürich AG is a public limited company with more than 2,000 shareholders, none of whom owns more than 10 per cent of the total capital of CHF 6.5 million. It receives public funding from the Zurich district, and additional smaller subsidies from the Zug district. The Grand Théâtre⁵ fulfils the public service mission imposed by the city of Geneva. The total audience for its 65 performances of ten different operas reached 75,800 people in 2008–09.⁶ Earned income (excluding sponsorship income) covers 28 per cent of the budget. Over an average 10 years, all direct and indirect funding from the city of Geneva accounted for more than 62 per cent of the budget. The Grand Théâtre is Geneva's only opera theatre. It is considered to correspond to a "French-style" approach and situation: in effect, the city of Geneva appears to be responsible for a "theatre in good working order", that is, for paying its fixed costs. La Fondation du Grand Théâtre, the body that governs operations, oversees the financial balance of productions between variable costs and resources. Variable resources currently cover 110 per cent of variable costs. The Grand Théâtre brings the city of Geneva prestige and renown, as does the Orchestre de la Suisse Romande created by Ernest Ansermet. The traditionally music-loving local audience is very attached to these two institutions. The city of Geneva lends the services of the Orchestre de la Suisse Romande to the Grand Théâtre for no charge.

The financial management of the Grand Théâtre is very strict and generates surplus income unequalled by the flamboyant financial results of the Zurich Opera: its reserve funds amount to CHF 3 million in 2009. Jean-Marie Blanchard, director of the Grand Théâtre until July 2009, has written, "The fact that a very small number of singers demand fees above the limit we have set ourselves has never deprived us of the greatest

artists.”⁷ The institutions’ cultural missions remain predominant. In 2008, Blanchard considered that “In the old Europe, anything that leads us to consider ourselves as a commercial institution ultimately exposes us to a definite risk of challenge to our existence.” The common feature of these two opera houses is that they are Swiss. The Zurich Opera applies a German model style production policy and American model style artistic and financial policies. Geneva’s Grand Théâtre displays the discipline and caution commonly attributed to the Swiss, and adopts management methods reminiscent of the French model.

The north-east quadrant

In the north-east quadrant of the matrix are opera houses with excellent financial autonomy scores and seat occupancy rates, some American such as the New York Metropolitan Opera, the Chicago Lyric Opera, the San Francisco Opera, the Houston Grand Opera, and the rest European, including Covent Garden, Opéra de Paris, the Vienna and Munich Staatsoper, La Scala in Milan, the Liceu in Barcelona and Madrid’s Teatro Real. Two festivals, the Santa Fe Opera Festival and the Glyndebourne Festival, would also fall into this quadrant. Their similarities and comparisons are particularly interesting, given that the dividing lines between these houses and festivals are only partly explained by national environments (Figure 9.6).

Financial autonomy ratios vary between 30 per cent and 50 per cent. Seat occupancy rates are at least 85 per cent. Most of these opera houses share several characteristics: high, sometimes extremely high, audience figures, theatres with some of the largest capacities in the world, frequent involvement of the most famous artists, and high average ticket prices even though price policies are in place to include lower-income groups (Table 9.3).

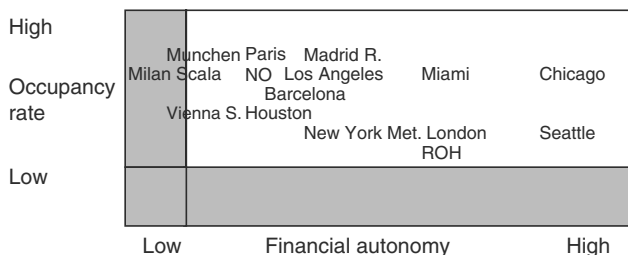


Figure 9.6 The north-east quadrant

Table 9.3 Theatre size, production volume, average ticket prices and audience (2006–07 figures)

Opera houses or companies: (S) specialized or (NS) non-specialized	Theatre size	Number of performances	Number of operas	Average ticket price	Audience in main auditorium (opera performances only)
Opera houses with theatres of over 2,500 seats					
Lyric Opera Chicago (S)	3,563	82	8	\$97	279,472
San Francisco Opera (S)	4,000	75	10	\$111	218,405
Paris National Opera* (NS)	2,780/1,900	178	20	€80	394,765
Opera houses with theatres of between 1,700 and 2,500 seats					
Covent Garden (NS)	2,253	164	21	€114	289,000
Liceu Barcelona (NS)	2,292	93	16	€60	201,744
Teatro Real Madrid (NS)	1,740	102	9	€81	156,776
Scala Milan (NS)	2,030	115	10	€105	
Staatsoper Munich (NS)	2,023	159	34	€132/10	323,121
Opera houses with theatres of between 1,100 and 1,400 seats					
Semperoper Dresden (NS)	1,360	196	43	€96/3	237,632
Glyndebourne (S)	1,200	75	6	€170	85,500

Note: * The *Opéra National de Paris* is a “mixed” case because of the size of its two main auditoriums.

The key figures for the opera houses in this quadrant generally corroborate the results of our statistical analysis. The houses with the largest auditoriums have the best seat occupancy rates and the highest average ticket prices. The same houses engage world-famous singers, conductors and directors. This observation is valid for both American and European opera houses, although the figures reveal certain differences. Some of these differences relate to the comparative size of the theatres, which can be divided into three groups. The very high-capacity theatres such as the New York Metropolitan (4,000 seats) are all in America. The theatre capacity in several of Europe’s national and regional capitals ranges between 1,700 and 2,780 seats. However, two low-capacity theatres – Dresden and Glyndebourne – achieve very high financial autonomy and seat occupancy rates. Another difference concerns the numbers of

productions and performances. The Dresden Staatsoper Semperoper records a slightly higher total audience than the San Francisco Opera, but for almost 2.5 times as many performances of four times as many works. These differences are partly explained by the potential audience, partly by the comparative seating capacities and largely by traditions. Another major difference already noted between American and European opera houses is the specialization in opera in America, as opposed to the diversification in Europe to include dance and concerts.

When the figures are reviewed, comparative analysis of these opera houses brings out other common features. Whatever the number of spectators, all of them have active policies to increase commercial income. One of the most telling indicators of this is the number of times the principal stage and auditorium are used per year. At the European opera houses, this number reaches, and sometimes exceeds, 300. During the 2007–08 season, Covent Garden, for example, used its stage and auditorium 309 times, for 167 opera performances and 142 ballets. At the Dresden Staatsoper Semperoper, the stage and auditorium were used 330 times during the 2009–10 season (for 196 opera performances and 134 ballets, concerts, recitals and children's shows). Including ballet, concerts and touring productions, La Scala staged 275 performances or musical events a year in 2005 and 292 in 2007, and has announced 300 for the 2009–10 season. The figures are lower at the Opéra National de Paris due to the existence of two main theatres. This high frequency of use also means opera houses' fixed costs are spread over a large number of events. This success explains why the commercial income at these houses – or “earned income” in US accounting terminology – is well above the level of ticket sales for opera alone. All these houses also seek to attract contributed income: the American houses look for donations; their European counterparts apply mainly for public subsidies, but also seek private donations on a smaller scale.

Glyndebourne is a case apart, because it covers 66 per cent of its operating budget with ticket sales and receives no public funding except for touring in towns in the south-west of England. This demonstrates the very clear link between an activity considered by the Arts Council England to be in the public interest and public funding.

4. Conclusions

This section summarizes the conclusions of the statistical analysis and the review of the conditions and recommendations laid down by providers of public or private funding. The statistical analysis gave four

series of results. Opera houses' programming is not a discriminating factor because over the seasons, they all balance out the choice of operas presented between the classics and rarer, more demanding operas, contemporary or otherwise. Having the most famous artists in the cast helps to increase the seat occupancy rate. The larger the theatre, the higher the financial autonomy and seat occupancy rate. The highest ticket prices are accepted by tradition.

The conditions attached to funding from public or private sources fall into four categories: general support for opera as an art form; the ambition to make opera more accessible by diversified price policies and children's artistic events; advanced professional training for young artists, particularly singers; and support for the creation of new operas.

The statistical results are sometimes at odds with these aims. Meanwhile, in the current context of national budget deficits in Europe, it is not certain that public funding can continue at constant levels in the long term. These conclusions and developments raise several issues that are not devoid of contradictions, many of them summed up in the outlook for opera houses' business models.

Should opera houses' business models be reviewed?

There is nothing new about this question for many European countries. The future of the Opéra de Paris was being discussed in the French parliament as early as the end of the 19th century. Between 1995 and 1998, the British government took matters at Covent Garden into its own hands. Today's worldwide crisis has once again brought to the surface the question of opera houses and companies' business models, which is in fact the question of their future. Professor Gerd Uecker in Germany, Marc Scorca in the USA and Nicholas Payne in Europe have looked at the fundamentals of these models as they perceive them in their own country or region. These fundamentals cannot be separated from operating models observed: the stagione model with seasons lasting a few weeks to a few months, predominant across the USA except at the New York Metropolitan; and the repertory model to be found in Germany, where seasons span the entire year despite all the adjustments to this model in the last 20 years.

Crossed fundamentals of the European and American business models

The dominant European model is constructed around three interrelated features. Public funding accounts for an average of nearly 80 per cent

of budgets, whether it comes from one or more public authorities. Box office income provides 10–25 per cent of budgets. Opera house management everywhere has to strike a balance between maximizing income and making opera accessible to the broadest audience, which is one of the justifications for receiving public funding. The cost of permanent staff – artistic, technical and administrative – absorbs 75–80 per cent of budgets. This cost reflects the facts that artistic activities carry on throughout the year, and that opera houses have permanent staff on long-term or permanent contracts. Of course, this dominant model does not exclude variations here and there, with several houses departing from the norm on one or more points.⁸ Apart from the outstanding exceptions of the few European opera houses able to do without public funding but therefore charging a very high average ticket price, all are dependent on public subsidies. However impressive the progress in box office income and donations at certain opera houses, it seems unlikely that ticket/donation income can be extended to the point of replacing public funding altogether.

The American business model is radically different from the dominant European model. “Opera management in the United States grows from a unique funding structure that places the major responsibility for supporting opera companies on the private sector”, Marc Scorca and Kelley Rourke remind us, stressing “the dependence on ticket income and support from individual contributions – along with the brevity of most seasons – (which) forces opera companies to achieve a higher level of excellence with every production and every performance”.⁹ Such is the scenery of the two business models, and their main consequences hold no surprises: in the USA, outsourcing and the need for flexibility are the rule; in Europe, the threat to the balance between public funding and fixed costs is a dominant concern.

In the USA, outsourcing is all the more important as the brevity of seasons and American culture both foster strong flexibility in cost structure. These two points, so striking to European observers, are also highlighted by Scorca and Rourke: “As one consultant observed, opera companies have been doing for decades what major corporations discovered more recently – outsourcing. Opera companies have a level of flexibility that enables management to adjust, at least somewhat, to external conditions by hiring the people they need when they need them.”¹⁰

Nicholas Payne comments on the European landscape and believes in a better balance between subsidy and commerce.

“Private contributions in Europe are unlikely to assume the dominant position they hold in the United States, Whereas an American may individually choose where a proportion of his taxes will be spent, thanks to

a system of tax incentives which rewards philanthropy, the European still delegates most of that power, and therefore that responsibility, to the state. Yet, there are stirrings of a counter movement, bred by a disillusion with bureaucracy and, in worse cases, with corruption. Although centralised finance ministries will continue to resist offering tax breaks, they are on the increase. In France, private contributions to the arts have increased dramatically after a relaxation of the tax laws. But, whereas such contributions were once primarily made by the corporate sector, the trend is towards an increasing reliance on individual donors.

State underwriting of opera is a relatively recent phenomenon. Opera began as a plaything of princes, before becoming an entrepreneurial venture. Handel was a businessman as well as a composer. Today, opera houses are once again exploring the commercial potential of their buildings and of their product. Managements seek to supplement revenue from their core business of presenting opera by exploiting the asset of a large public building with a premium value. They are also alert to using modern reproductive technology to making their primary products available through secondary rights in other media, such as cinema, television and commercial recordings. While their promotional value may be greater than their profitability in many cases, these opportunities can play a part in the mixed economy of opera today.

Opera has remained backward in joining the public/private partnership world. In many parts of Europe, the reliance on state support is still paramount. Yet, English 'country house opera', exemplified by Glyndebourne and its imitators, is not the only exception to this rule. At the other end of Europe, Belgrade's Madlenianum Opera and Theatre in Serbia and Operosa of Evxinograd near Varna in Bulgaria are both entirely privately financed. There will be more such enterprises.

In the comparable worlds of spoken theatre and modern art, there is a more even balance between subsidy and commerce. Not only do they co-exist, but they feed off each other. The commercial sector benefits from the longer-term investment of the subsidised sector, while the latter has learned to adopt an increasingly commercial attitude to programming and marketing, in order to thrive in the market conditions. These lessons will gradually be applied to opera, too."¹¹

Simultaneous control of both the artistic and financial dimensions is acknowledged to be a primary requirement, together with a capacity for rapid responses and permanent flexibility, in both prosperous times and times of crisis. Marc A. Scorca quotes the golden rule often mentioned by Rudolf Bing, who was general manager of the Metropolitan Opera from 1950 to 1972: "For every artistic decision there is a financial implication

and for every financial decision there is an artistic implication",¹² and adds: "At times of stress, opera managers really prove their skill. Opera management is not nearly as difficult in times of economic prosperity as it is during times of reduced contributions and lower ticket sales. These situations create tough choices that place artistic achievement and financial stability in a delicate balance."¹³ This is backed up by a remark by William Mason of Chicago: "I run an opera house; I also run a business."¹⁴

Fundamentals under pressure from the worldwide crisis

The current crisis is revealing the extent of American flexibility and adaptability. First, there are the inexorable effects of a short-term or long-term lack of adaptability, forward planning or support from donors. In 2008–09, four American opera houses and companies with annual expenditures of between \$2 million and \$8 million closed down because they were unable to achieve financial balance: Opera Pacific, Baltimore Opera Company, Orlando Opera Company and Connecticut Opera. A new opera company will perhaps re-emerge in Baltimore in one form or another. These closures should not be allowed to obscure the adaptability displayed by other houses and companies. In January 2010, Chicago's Lyric Opera reported a 13 per cent decrease in box office income and anticipated a shortfall of \$1.5–2 million in sales revenues. It announced that the number of performances for the 2010–11 season would be cut from 77 to 68. The New York Metropolitan has seen a \$10 million decline in donations. Its managers have already taken a 10 per cent pay cut. Total cuts in administrative expenses totalled \$7 million in 2009, equivalent to 2.4 per cent of the \$291 million budget declared for 2010. Programming is under review, again in order to reduce costs: revivals of John Corigliano's *Ghost of Versailles* and Berlioz's *Benvenuto Cellini* have been cancelled, to be replaced by a series of performances of *La Traviata*. Peter Gelb called Joseph Volpe in as advisor for relations with the unions. The managements of these houses have communicated widely on these decisions. There are many more such examples from Houston to Washington, and in many small companies, which, to borrow an expression from sailing, can and do pull in the sails in stormy weather. Paradoxically, in Chicago and Houston, and in many other houses, donations have actually increased rather than fallen in the current crisis period, in a reflection of their respective ownership's attachment. The American boards and general managers are aware that their future lies in their own hands. They accept this and take

action accordingly, with varying degrees of success, but without ever considering the possibility of public funding.

The public funding/fixed costs balance is the dominant preoccupation in Europe, because it engenders fears of imbalances, and the threat that such imbalances could affect the availability of sufficient artistic resources. These preoccupations are growing in an environment full of uncertainty over which public policies will be adopted to reduce (or maintain) national budget deficits in almost all European countries, and in what proportions. Only in Italy were subsidies from the central administration to the 13 operatic foundations reduced in 2010 compared to 2009 levels, and substantially at that (30 per cent). Professor Uecker stresses the threat of distortion between externally imposed rises in fixed costs at German theatres and opera houses and the stagnation, if not reduction, of subsidies: "Unfortunately there is no homogeneous, fundamental regulation stipulating that the public authority governing the opera house and providing its funds must also compensate for pay rises resulting from its own action by adjusting theatre subsidies accordingly. In the long term, this situation will complicate opera houses' activities, for they will still be required to maintain their artistic level and balance their (often low) budget despite having to pay higher salaries. Operas are increasingly being forced to accept labour agreements governed by common standards."¹⁵ The phantom of Baumol is near!

Starting from a familiar observation, Nicolas Payne raises several key questions concerning European opera's fixed costs: questions that are in everyone's mind but generally remain unspoken.

"Traditionally, opera is very labour intensive, because of its requirements for larger forces of singers, orchestral musicians, and technical and administrative back-up. The full-time salary bill can absorb as much as three quarters of the total budget. That sort of establishment level may be justified, if it delivers a substantial body of work, but the danger is that it may grow ever greater over time until the maintenance of the permanent staff becomes an end in itself. It becomes necessary to ask what services are provided for those salaries, and whether the time-honoured services are what are now required to produce the work. Do labour agreements provide the flexibility to rehearse and perform as today's creative artists and today's mobile audience demand? Do they encompass the secondary rights necessary to disseminate work through other media? How may they be reformed in ways which protect social rights and expectations, while at the same time fitting today's patterns of work?

The answers will vary according to the different practices and priorities of the wide range of institutions in the many countries which make up Europe. But, in each case, it will be necessary to strike a balance in the productivity equation, if a long-term future is to be secured. Some companies carry within themselves the capacity for evolution and self-renewal. Others may require a more radical revolution, even destruction, if opera is to be born again in their community."¹⁶

Of the prospects and issues explicitly or implicitly present in the current business models, four require particular attention: diffusion, performance venues, developments in the very genre of opera and, in a return to the original method, ongoing comparison between models and opera houses.

Diffusion stakes

Diffusion is certainly one of the most important and complex strategic issues, pulled unsurprisingly in opposite directions by the statistical analysis and the conditions underlying contributed income. Excellent financial autonomy ratios and seat occupancy rates signal economic success. Lower ticket prices, when associated with respectable levels of diffusion, indicate success in terms of outreach and greater accessibility to opera, but continuing satisfactory seat occupancy rates cannot always guarantee the success of these policies. In purely economic terms, low or moderate ticket prices and low seat occupancy rates give unsatisfactory results. How can a satisfactory financial autonomy, a central requirement for economic success, be better reconciled in the future with the recommendation – considered justified by everyone across Europe and the USA – that opera houses should be accessible to the largest possible audience? Timely and valuable solutions are provided by information technologies in the form of high-definition (HD) cinema, television and the Internet – but they do not apply to the live performing arts. There is no magic solution, only answers in the form of trade-offs that bring us to the question of performance venues.

Performance venues

Behind the varied range of venues for opera performance, a first issue is the suitability of some theatres for acceptable operations by opera companies. The “multipurpose” function of most of the theatres used for opera is as much a practical reality as an objective for the future. Renewal of the auditorium/stage architecture remains a challenge.

Observation of the places where opera is performed in Europe and North America shows a distinction between present theatres and other venues that are sometimes chosen. Whether recent or very old (in some cases, several centuries old), the theatre buildings are omnipresent in our statistical analysis and the strategic positioning of opera houses.

Nowadays operas are also performed in an enormous number of non-specialist theatres known deservedly as multipurpose. Some houses and companies lease the theatres they need for specific periods: this is quite common in the USA and sometimes observed in Europe (Cardiff). In Europe, most opera houses with their own theatres tend to diversify their artistic activities; Germany's Musiktheater divide their time between opera, ballet, concerts and occasionally operettas and musicals. There are thus multipurpose theatres everywhere, even though management may differ.

Whenever it is proposed to build or rebuild a theatre, renovating the architecture of the auditorium and stage areas remains a challenge. The use, size and configuration of a theatre must therefore be treated as decisive strategic factors. There is much to be gained from clearly addressing several questions. What is the intended purpose of the new theatre? Is it to be used solely for opera, or for a range of artistic activities? What frequency of use could reasonably be envisaged, and for which artistic activities? Are the proposed seating capacities based on the prospects for economic operations and budget forecasts? The larger the expected audience (the potential market) appears, the greater the potential for specialization, and conversely, diversification of artistic activities is vitally necessary when the expected audience for opera is small. In Cardiff, Amsterdam, Oslo, Erfurt and more recently in Dijon, to name just a few examples, a clear decision has been made to build multipurpose theatres and auditoriums. As we have seen, the architecture in Europe often encourages conservative solutions, where attachment to historical monuments has led to building or rebuilding approaches designed simply to preserve the model inherited from the past. However, newly built theatres in both Europe and the USA combine modern exteriors with a less conservative approach to wide-ranging musical and theatrical activities. In the USA, companies continue to invest in new facilities, from large performance halls (Dallas Opera, Florida Grand Opera) to "opera centres" that provide a combination of administrative, rehearsal and alternate performance space (Opera Memphis, Nashville Opera, Opera Theater of Saint Louis, Indianapolis Opera). The same trend is visible in Europe, at theatres as different as the Regio in Turin, the Millenium Centre in Cardiff, Het Musiektheater in Amsterdam,

the Aalto Theater of Essen, the Theater Erfurt, the Norske Opera and Oslo's Ballet Theater, which combine modern exterior architecture and state-of-the-art stage facilities with visual and acoustic comfort for the audience.

Nonetheless, the fact remains that theatre interiors and the auditorium/stage areas change at a slower pace than external architecture and the set and scenery facilities. Low motivations on the part of architects, or the lack of renewal of opera as a genre, probably explain the difficulty of designing opera house interiors that break with the past. Pierre Boulez is constantly highlighting these questions (Kiesel, 2007, pp. 198–201), which are not unrelated to the structure of opera composition today.

A new, comfortable theatre with adequate stage facilities costs several hundred million euros or dollars, and should theoretically be built to last several decades. They should certainly not be conceived as future historical monuments. Whenever a theatre is to be built, this issue almost always concerns local cities, regions, provinces and even nations in Europe, and often public authorities in the USA.

Renewal of opera as a genre

The issues related to this concern pervade almost all the chapters of this book: which works are performed, why does opera as a genre and the most famous operas in the repertory hold such continuing fascination across all ages and nations? New operas are regularly composed and performed, but why is renewal of the genre so laborious and at least in appearance unable to create more than a few new works with lasting popularity? Of course, some composers had to wait decades or more for their success, even Mozart. There is an eagerness to help everywhere, from the general managers of opera houses who are well aware of the question's importance, to the providers of public or private funding who want to give today's composers a chance. Are today's potential opera composers closer to opera houses or entertainment enterprises that are used for worldwide dissemination to spectators counted by the million? Could it be that Mozart, Wagner, Verdi and Puccini, if they were alive today, would have moved to California and joined forces with artist/entrepreneurs such as Steven Spielberg and James Cameron, as Walter Legge did in a totally different register after the Second World War when he joined EMI with a host of famous singers and large opera houses to make classical music recordings that have remained among the best ever?

Should comparisons between opera houses continue?

We are well placed at the end of this book to assess the difficulty of the exercise. But the answer is an unhesitating Yes. Comparisons have become standard practice in the USA and are very easy in Germany. *Opera America* is a private association with a membership of almost 110 American and Canadian opera houses. It gathers highly detailed quantified information that is made available to its members. Annual summaries are published, for instance, the *2008 Annual Field Report*, which we were able to consult. The *Deutscher Bühnenverein*¹⁷ in Germany acts as a quasi public institution for the Musiktheater and public theatres, and its annual *Theaterstatistik*, which is accessible to the general public, supplies a large quantity of comparative information. Differences in categories and items used in the two documents largely result from the North American houses' concentration on opera, whereas the German opera houses' Musiktheater tend to function as multipurpose venues. Managers of both types of organization often play a consulting role in their respective countries, at the request of a board of trustees, the general management of an opera house, a city or a Land depending on the circumstances. They are able to fulfil this role because they have had access to comparative figures for several years. Over the last 5 years, *Opera Europa* has constructed a database of figures accessible to members who contribute their own figures for defined items, in a system similar to *Opera America*. Other countries are creating their own opera house databases, for example, the *Réunion des Opéras de France*, which has chosen to define items compatible with *Opera Europa* data. The Arts Council England no doubt has valuable figures for the opera houses and companies in the UK.

The comparative analysis approach remains difficult, for the reasons already referred to several times: the diversity of operating models – some opera houses and companies specialize in opera alone, others are diversified and present dance, classical music concerts, maybe even jazz and contemporary popular music; diverse employment laws and accounting methods apply; the environments too are diverse. Why then continue comparisons? Properly handled, a comparative approach brings out “best practices”, practices that lead to progress in management, cost control and artistic results, and can also advance strategic reflection. The examples of the USA and Germany confirm that this conclusion is justified. Experience has shown that the Anglo-American “benchmarking” approach is always beneficial, especially in times of difficulties or crises. The existence of statistics-based analytical models is disconcerting to some, but reasonable use of such models can be an aid for forward-looking reflection.

The outlook for opera houses: identifying the issues and two major strengths

Identifying the issues

So far, the fundamentals supporting the existence of opera houses have come through ages and crises. There are a wide range of reasons for the existence of opera houses, their *raison d'être*, the financial resources they collect and the opera productions they stage. It is genuinely difficult, if not impossible, to assess the respective influence of each of the reasons and motives that both underpin and threaten their existence. Some relate to objective observations and others to their artistic reach.

Objective observations

The often deeply rooted operatic traditions in Europe, and also in the USA, and the popularity of the composers whose works are constantly performed all over the world are both a major asset and a sign of how difficult it is for new operas to be accepted into the standard repertory. The taste for singing is just as alive and well as in the past, and so is opera-lovers' certainty that a large number of operas belong to the cultural heritage of humanity. Carmen, Mimi, Lucia, Elsa, Norma, Rigoletto, Papageno, Siegmund and Sieglinde, Tristan and Isolde and many others are beloved by a varied and increasingly global audience which is not only to be found in the upper echelons of society. Some progress is being made in renewing the repertory, but it remains statistically uncertain. There have been constant links between the social prestige of theatres boasting attractive period or modern architecture, the most famous of which produce and perform the most popular operas with the most famous guest artists, the most reputed conductors and the best-known stage directors, and the size of the audience numbers for these opera houses. But prestige cannot explain everything. Smaller houses and companies with less resources but just as much motivation as the larger ones have their own loyal audiences. It matters little that the singers and conductors are less famous if they bring genuine talent to serve the operas performed. European public funding for opera houses is justified by a range of reasons, right up to support for employment of theatre staff and performers. In the USA, private donations continue unabated provided funds are sought for realistic, responsible projects that the trustees are generally capable of evaluating. The financial differential between production costs and effective diffusion remains substantial, whatever the format. The arguments are repeated generation after generation: opera is an expensive art form, disregarding multimedia channels, only has limited dissemination; over the last two

centuries, crises have regularly shaken opera houses and even put some out of existence. But those houses have re-emerged in new forms, and funding problems occasionally considered insoluble have always found solutions.

The artistic reach of an opera cannot be separated from live performance. It is not easy to describe the feelings that can be stirred by an opera performance, when the combined talents of the singers, musicians, conductor and director create a miracle of music, stagecraft and drama. Magical performances can occur in the largest houses with the most prestigious casts, but also on small stages with limited resources brought alive by the creativity, generosity and skills of the “assemblers”. There are occasionally bad performances, often adequate, workmanlike performances, sometimes magical performances. In such cases the opera house justifies its existence on a basis no longer related to reason, but to emotion.

The communities and audiences close to opera houses and companies, and their home towns, often hold them in deep affection.

Will this still be the case in the future? To this question, we can only answer that many opera lovers and supporters of opera houses and companies on both sides of the Atlantic are actively seeking positive responses for the future, optimizing benefit from their strengths but also addressing their weaknesses or ambiguities.

Two major strengths: entrepreneurship and the vitality of artistic training

Entrepreneurship has its own zones of predilection in every area and every period. There are plenty of examples, some famous, others less so. In the UK, the Glyndebourne Festival, a flagship in the worldwide operatic ocean, was brought into existence solely through the determination of John Christie, who with the support of his wife, a singer, was able from the outset to call on the greatest talents of the time. The smaller-scale Garsington Festival began in 1982 thanks to the initiative and obstinacy of Leonard Ingram and his wife Rosalind. Its future is currently under threat, although it has carved out an excellent reputation in a short time, staging eight operas by Richard Strauss, eight by Mozart and ten by Rossini, to name only three composers, in just 27 years. In Poland in the early 1960s, the musician Stefan Sutkowski, director of a baroque orchestra, founded the Warsaw Chamber Opera, which only has a 200-seat theatre in Warsaw but performs and tours in many venues in Poland and the rest of Europe. Between 1961 and 2001, Stefan Sutkowski’s company gave over a thousand performances or an average of 25 a year, attracting around a million spectators in all. In 2009, the

Warsaw Chamber Opera had a repertory of over 80 operas (costumes, sets and props, an orchestra familiar with the scores, the ability to cast singers having already sung roles in those operas), principally comprising 18th-century works including the entire operatic output of Mozart and, naturally, Polish operas. In France, the oboist Jean-Claude Malgoire and the American-born harpsichordist William Christie, both displaying true entrepreneurial spirit, rediscovered French and European baroque music and progressively reintroduced the repertory to the entire world. Each formed his own company: La Grande Ecurie du Roi for Jean Claude Malgoire, and Les Arts Florissants for William Christie. They opened up a path that is now trodden by others, from Emmanuelle Haïm to Jean-Christophe Spinozi. It is true that what we call baroque opera is highly compatible with smaller, economic formats than German and Italian operas dating from the second half of the 19th century. In Europe, these opera entrepreneurs combine musical innovation, talent-spotting, a flair for public and private fund-raising, and the ability to cooperate with the world's greatest opera houses, offering "ready-made" or practically complete productions. Conductors as different as Nikolaus Harnoncourt, Herbert von Karajan, Valery Gergiev and Daniel Barenboim have shown they were not content merely to direct orchestras or mount opera productions, and also have entrepreneurial skills, with an inclination for innovation which they put into practice. In the USA, the Santa Fe Opera Festival has its origins in John Crosby's taste and initiative. The same qualities explain the vitality of donors in the USA, who provide funding for all the American opera houses and companies and in New York, Dallas and Fort Worth contribute to renovation of theatres partly intended for opera. There are many more such examples.

There is currently a lively enthusiasm for artistic training for musicians or singers. Music schools and training colleges all over the world are receiving applications from highly motivated candidates. Across Europe and the USA, the quality of instrumental and voice training is rising to excellent levels. Such training lies "upstream" of the opera houses and companies, but the boundaries fluctuate depending on the country and region. In March 2010, students from the Faculty of Communication and Dramatic Arts at Central Michigan University staged a local production of *Don Giovanni*. Singers on advanced training placements are often offered small roles in the productions staged by the opera houses to which they are attached. Some training centres, such as the Opéra National de Paris's Atelier Lyrique, stage their own simplified opera productions with the support of the parent company,

to great acclaim. Similar to the USA, there are many small, private companies in the UK and all over Europe (but probably more in the north) producing operas on a modest budget, each with its own particular emphasis on musicals and operettas, or opera itself, baroque or otherwise. There are also close or looser bonds with the schools that train singing teachers for ordinary schools. Some of these companies have personalities from the world of opera on their boards, for instance, the former Covent Garden chief executive Sir Jeremy Isaacs, the baritone Sir Thomas Allen or conductor Charles Mackerras. The artists themselves sometimes get together to set up non-institutional opera formats intended for temporary or more long-lasting existence. Marc Scorca describes how in 2009 in New York, in a move unrelated to any institutional consideration, several singers and musicians with a shared interest in opera grouped together to lease penthouse apartments for a few evenings, where they would perform an opera by Mozart or Donizetti solely for their own amusement and that of a very small audience. The requested contribution to expenses was no more than a few dozen dollars. After a few performances, these groups disband, although they may reform for other opera projects. The very existence of such groups reflects a truly proactive approach. Entrepreneurship and vitality of musical and operatic training together form a particularly fertile breeding ground for tomorrow's opera houses and companies.

"Most of the smaller opera groups are artist-led", confirms Nicholas Payne.

("They reflect the need of composers and conductors, singers and production teams, to express themselves outside the constraints of the big institutions. Many are financially precarious, but light-footed enough to survive economic downturns and, if necessary, to hibernate until warmer conditions return. Crucially, they are moulded to the needs of the creative forces, and can respond to new developments in the art more readily than the larger companies with their obligations to maintain an established staff and the imperative to pursue challenging targets for ticket sales.

It would be wrong to conclude that the flexible smaller-scale models are set to supplant the traditional opera houses. The public continues to seek out the spectacular experience which grand opera can provide. Governments and powerful philanthropists are employing imaginative architects to design imposing buildings for the 21st century. Rather, both trends, the small and the great, are part of an increasingly rich operatic ecology. It is significant that the new Oslo Opera House, opened

in 2008, was built with a large measure of popular support, has rapidly become Norway's No. 1 tourist attraction, and sees part of its mission as reaching out towards the whole population of its geographically dispersed country.")¹⁸

The future of opera houses is not foreseeable, but we nevertheless know in whose hands it lies today. In the USA no doubt more generally than in Europe, it lies in the hands of the trustees, board members and executive committees who, together with the general managers, exercise a decisive influence on the way they operate and, being familiar with the underlying rationale, are able to bring about change. In Europe, elected officials and political leaders in charge of cultural policy, and the local and national civil servants whose job it is to monitor publicly funded opera houses' activities, often hold large amounts of relevant information. Wherever there is an appropriately appointed, competent board, the prospects for pertinent assessment of the problems encountered are greater. Planet opera exists. Reflection on the future of opera houses should be carried out on that planet, but not on that planet alone.

Appendix A

Sample and Variables

Table A.1 Dictionary of variables based on figures of our 2005–07 comparative study

Name of variable	Definition	Measurement method	Average value	Range	Observations
Alignment with classics		Artistic policy			
		% of performances of group 1 works	50	0–100	Group 1 works account for over 50% of all performances
Most performed periods		% of performances of operas composed in the 19th century and first half of the 20th century	78	23–100	
Modernity	Programming of contemporary operas	% of performances of operas composed after 1950	7	0–34	Lowest: the Châtelet, Lausanne, Leipzig and Helsinki; highest: Vienna, Venice Fenice, Vancouver and Turin Regio
Fame of conductors		Average number of houses with guest conductors	2.12	1.00–3.50	Total opera houses with guest conductor for opera X, divided by the number of guest conductors. Same procedure for directors and singers. Vienna, Zurich, Barcelona and Munich head the list on these criteria
Fame of directors		As for conductors	2.58	1.00–6.50	
Fame of soloists		As for conductors			
		Production policy			
Number of productions			14	4–48	20 in Salt Lake City, 23 in San Diego, 244 at the Vienna Staatsoper
Total number of performances			90	20–244	

Table A.1 (Continued)

Name of variable	Definition	Measurement method	Average value	Range	Observations
Number of performances of new productions			25	0–109	
Number of performances of old productions			58	0–204	
Alternation of works		Average number of works performed in a week	2.1	1–4	4 in Vienna, Mannheim, Hamburg
Number of performances of co-productions			5	0–64	64 for Opéra de Paris, 52 for New York City Opera
Number of performances of rented productions			3	0–49	49 for Barcelona, 36 for Turin Regio
Number of touring venues			5	1–12	For houses that take productions on tour: 12 for Aarhus
Physical capacity	Number of seats in main auditorium	Environmental conditions	1,820	481–3,995	Lowest: Heidelberg; highest: Metropolitan, New York
Density of opera on offer	Opera on offer in the local urban area	Number of inhabitants per ticket on sale	14	0.6–110	0.6 in Santa Fe, between 2 and 4 in the German-speaking area, approximately 20 in North America, 110 in Tokyo

Operatic tradition	Length and degree of establishment (rooting) of the operatic tradition in the zone	-	1.5-47	47% in Italy, 32% in the German-speaking area, 10% in France, 1.5% in the USA
Average per capita gross national income	Per capita gross national income (GNI)	36,460	€7,110-€54,930/year	Lowest: Poland; highest: Switzerland
Financial Autonomy	Financial resources related to activities	0.26	0.06-0.46	Lowest: Ostrava; highest: Zurich
Seat occupancy rate	Average occupancy rate for the main auditorium	0.84	0.50-0.95	Lowest: Athens; highest: La Monnaie, Brussels
Average cost per ticket	Total cost divided by number of tickets sold	288	98-806	Lowest: Montreal; highest: Athens
Average ticket price	Box office income divided by number of tickets sold	60.50	13-173	Lowest: Warsaw; highest: Zurich
Average cost per performance	Total cost divided by the number of opera performance	377,000	77,000-828,000	Lowest: Tallinn, Highest: La Scala, Milan

Table A.2 Opera house sample

Aarhus	Helsinki	Prague Statni
Amsterdam	Houston	Rome
Antwerpen	Köln	Rostov
Athens	Lausanne	Salt Lake City
Barcelona	Leeds Opera North	Salzburg
Bayreuth	Leipzig	San Diego
Berlin Deutsche	London ENO	San Francisco
Berlin Komische	London Royal Opera	Santa Fe
Berlin Staatsoper	Los Angeles	Seattle
Bregenz	Lyon	Stuttgart
Bruxelles Monnaie	Madrid Real	Tallinn
Cardiff WNO	Mannheim	Tokyo NNT
Chicago	Mainz	Toronto
Copenhagen	Miami	Turin Regio
Dallas	Milan Scala	Vancouver
Detroit	Montréal	Warsaw Wielki
Dresden	Munich Staatsoper	Vienna Staatsoper
Düsseldorf/Duisburg	New York City Metropolitan	Vienna Volksoper
Frankfort	New York City Opera	Washington
Geneva	Nürnberg	Zuid
Graz	Oslo	Zurich
Hamburg	Ostrava	
Heidelberg	Paris National Opera	

Appendix B

The Statistical Analysis of Opera Achievements

This appendix aims to explain the performances of opera houses with regard to two criteria: financial autonomy and the seat occupancy rate. Quantifications of artistic policies, production policies and key environmental factors will be proposed. It becomes clear that it is these factors – auditorium capacity, density of opera on offer and operatic tradition – that essentially explain opera achievements.

1. Analysis method

A model is constructed by aggregating available data in the form of factors characteristic of the principal policies of opera houses and their environments. These factors are then used to explain the achievements of opera houses.

The sample analysed consists of 62 opera houses listed in Appendix A. It cannot be considered representative in the statistical sense of the term, since to the best of our knowledge, the characteristics of the population of opera houses are not reported anywhere. Nevertheless, it does correspond to the geographical distribution of opera houses, strongly dominated by North America and Western Europe, Germany and the German-speaking zone in particular. Almost all the North American operas playing more than 20 times a year have been selected in the sample. Of the total, these 14 houses attract 4.3 million spectators per season. Then, a random sample of large German-speaking operas was selected on the basis of production volume and audience. It is composed of 19 opera houses ranging from 65 to 244 performances a season, and attracting the same amount of spectators as North American operas. For the rest of the world houses, mainly Western European ones, we used the available data from houses performing 21–207 times a season before an equivalent audience. This sample correctly represents large houses attracting around 75 per cent of the total lyric art audience. The results do not apply to small houses (less than 20 performances a year in North America, less than 60 in Europe). Festivals have been removed from the analysis. The data collected on 62 opera houses in the sample are used to construct variables characteristic of the concepts of policy and the environment.

Artistic policy is represented by two factors characterizing the choice of works and the choice of guest artists: conductors, directors and soloists. For the programming, the following variables are aggregated using a factorial analysis: alignment with the classics, periods most frequently performed and the modernity of works. The Cronbach alpha for this factor, named “programming conformity”, is 0.66. The factor named “fame of guest artists” is constructed by

Table B.1 Conductors' fame score

House A		House B	
Adam Fischer	5	Alexandro de Marchi	2
Alexander Joel	3	Andoli Levin	1
Bertrand de Billy	1	Baldo Podic	1
Piers Maxim	1		

aggregating three scores reflecting the fame of conductors, directors and soloists. These scores are calculated using the index of conformity devised by Di Maggio and Stenberg (1985) to analyse theatre programming. They are computed by adding the number of opera houses in which each artist has performed or directed during the season, and calculating a "fame score" for each house and each category of artist. For the example shown in Table B.1, if opera houses A and B have invited the following conductors during the season, and in the course of that season those conductors have performed in the number of houses shown to the right of their name, house A's score is $(5 + 3 + 1 + 1)/4$ or 2.25, while house B's score is $(2 + 1 + 1)/3 = 1.33$.

The same process is applied for all opera houses and all three categories of artist. The Cronbach alpha for the "fame of guest artists" factor combining the above three scores is 0.65. This score may contain certain biases. Some opera houses (such as the New York Metropolitan) have resident conductors who direct many works locally and rarely perform elsewhere, and their score will be lower than the score for opera houses that practically always use guest conductors. This phenomenon is less marked for directors and soloists. Opera houses involved in co-productions tend to invite well-known artists, particularly directors, and have high fame scores. This is confirmed by the Pearson correlation coefficient between the number of joint productions and the fame of artists, which is significant at the 0.01 level.

The production policy is represented by two factors: the volume of operatic activities and the volume of non-operatic activities. The first of these factors combines, for each season, the number of opera productions, the number of performances, the number of performances of productions revived from previous seasons and the average number of different works staged in a week. Its Cronbach alpha is 0.90. The second factor associates the number of ballets and concerts in each season, with an alpha score of 0.65. A third factor combining network activities such as purchases and rental of productions, co-productions and touring productions was rejected due to its low alpha score.

Environmental conditions are represented by a factor named "potential opera on offer" and a variable in the form of per capita gross national income. The potential opera on offer results from factor analysis applied to three variables: the physical or seating capacity of the principal auditorium, the density of opera availability as measured by the number of inhabitants in the urban area divided by the number of opera tickets available in the same geographic area, and the local operatic tradition, represented by the percentage of operatic works composed in the country or region. For an opera house, this capacity is considered as an internal source of revenue. It is considered here as an environmental

factor because it is likely to influence the opera house's achievements while the management are unable to change it in the short or medium term. The Cronbach alpha score for this factor is 0.68.

The achievement criteria used are financial autonomy, measured by the ratio of box office income to total budget, and the auditoriums' seat occupancy rate, expressed as the ratio of the number of tickets sold to the total number of tickets available.

2. Statistical results

A multivariate analysis method was required to take the various interactions between variables into consideration. The "path analysis" method was selected and analyses were carried out using the AMOS 7 Graphics package. This method uses multiple regressions to test the hypothetical causal relationships expressed in a theoretical model. It comprises two stages to attempt successive explanations of the two achievement criteria selected: financial autonomy, and then the seat occupancy rate.

Financial autonomy

The financial autonomy of an opera house is defined as the ratio between box office income and the total budget. Expressed per ticket sold, it is also the ratio of the average ticket price to the full cost per ticket. These two intermediate variables are introduced in order to separate the direct effects of policies on achievements from their indirect effects through the intermediary of average prices or full costs per ticket.

Estimation of the theoretical model led to rejection of variables that were not significant at the 0.05 level. Programming conformity and per capita GNI were rejected because they had no significant effects on financial autonomy, either directly or indirectly through the intermediary of ticket prices or costs per ticket.

The model shows satisfactory goodness of fit, with Root Mean Square Error of Estimate (RMSEA) of less than 0.000, Normal Fit Index (NFI) of 0.985 and Comparative Fit Index (CFI) of 1.000. RMSEA compares the quality of the estimation with the quality of the saturated model. NFI compares the model with the independent model. A value above 0.95 indicates good fit. CFI is suitable for small samples. A value above 0.95 indicates good fit.

Figure B.1 shows the variables that are significant in explaining financial autonomy and the associations between these variables, indicated by arrows. Each arrow corresponds to a direction and a degree of influence. The relative degree of influence exercised by each variable on its downstream variable(s) is shown by the standardized regression coefficient – from 0 to 1.

Variables determined outside the model are correlated, as shown by the curving arrows on the left of the diagram. The opera houses with the highest volumes of operatic activities are also those that have the most renowned guest artists. Opera houses in an environment with high potential opera on offer – large physical capacity, low local opera on offer and a weak operatic tradition – have low volumes of operatic activities.

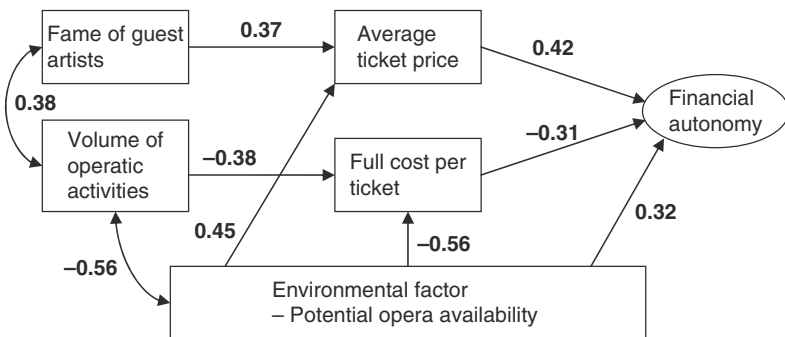


Figure B.1 Explanation of financial autonomy

Seat occupancy rates

The same techniques are used to estimate the model explaining the seat occupancy rate. The model shows satisfactory goodness of fit, with RMSEA of less than 0.000, NFI of 0.978 and CFI of 1.000 (see Figure B.2).

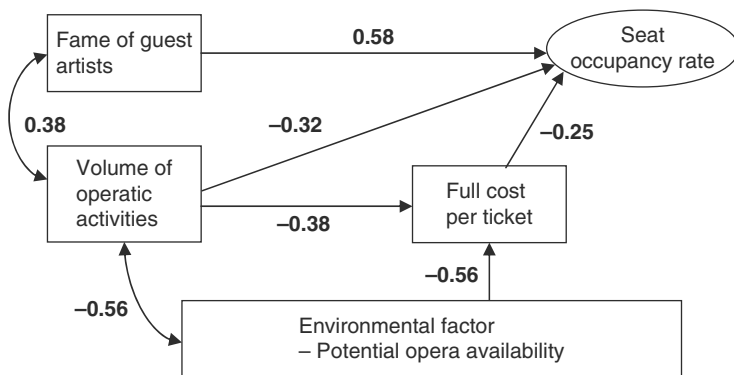


Figure B.2 Explanation of seat occupancy rate

Glossary

Houses' Main Responsibilities and Functions

When mentioning the main opera houses' responsibilities, we use the words:

General manager: has the highest executive responsibility.

Music director: usually the main conductor, sometimes sharing part of the artistic responsibilities.

Stage director: has overall responsibility for each new theatrical production and generally proposes the choice of set, costumes and props designs.

Finance and administrative director: in this defined field. The German *Geschäftsführer* may be considered as a managing director dealing with financial aspects of the management. The *Geschäftsführender Direktor* is in charge of all administrative and financial responsibilities.

When mentioning the responsible manager of a given opera house, we use their title in the local language as shown in the table. The German orthography of *Intendant* in singular as in plural is the same. In the text, *Intendant* in plural (as *Geschäftsführender Direktor*) appear in *Italics*.

Country	General manager	Music director	Stage director	Finance and administrative director
France	<i>Directeur</i> or <i>Directeur</i> <i>general</i>	<i>Directeur</i> <i>musical</i>	<i>Metteur</i> <i>en scène</i>	<i>Directeur administratif</i> <i>et financier</i>
Germany	<i>Intendant</i> ; <i>Staats</i> or <i>Stadt</i> <i>Intendant</i> or <i>General</i> <i>Intendant</i>	<i>Musikdirektor</i>	<i>Regisseur</i>	<i>Geschäftsführer</i> or <i>Geschäftsführender</i> <i>Direktor</i>
Italy	<i>Sovrintendente</i>	<i>Direttore</i> <i>musicale</i>	<i>Regista</i>	<i>Direttore Administrative</i> <i>et Controllo</i>
Spain	<i>Director</i> <i>General</i>	<i>Director</i> <i>Musical</i>	<i>Director</i> <i>d'escena</i>	<i>Director Economic y</i> <i>Financier</i>
UK	General manager or General director or Chief executive	Music director	Stage director	Director of administration and finance or Finance director or Chief financial officer

(Continued)

Country	General manager	Music director	Stage director	Finance and administrative director
USA	General manager or General director	Music director	Stage director	Director of administration and finance or Finance director or Chief financial officer

Opera titles in their original languages and in English

Original opera title	English translation	Composer
<i>La damnation de Faust</i>	<i>The damnation of Faust</i>	H. Berlioz
<i>La fille du régiment</i>	<i>The Daughter of the Regiment</i>	G. Donizzetti
<i>L'elisir d'amore</i>	<i>The Elixir of Love</i>	G. Donizzetti
<i>Le balcon</i>	<i>The Balcony</i>	P. Eötvös
<i>Vêc Makropoulos</i>	<i>The Makropoulos Affair</i>	L. Janacek
<i>Il ritorno d'Ulisse in patria</i>	<i>The Return of Ulysses to his Home Land</i>	C. Monteverdi
<i>L'Incoronazione di Poppea</i>	<i>Coronation of Poppea</i>	C. Monteverdi
<i>La finta semplice</i>	<i>The Wrong Artless Girl</i>	W.A. Mozart
<i>Die Entführung aus dem Serail</i>	<i>The Abduction from the Seraglio</i>	W.A. Mozart
<i>Le nozze di Figaro</i>	<i>The Marriage of Figaro</i>	W.A. Mozart
<i>Die Zauberflöte</i>	<i>The Magic Flute</i>	W.A. Mozart
<i>La Clemenza di Tito</i>	<i>The Clemency of Titus</i>	W.A. Mozart
<i>Ascanio in Alba</i>	<i>Ascanio in Alba</i>	W.A. Mozart
<i>Die Lustigen Weiber von Windsor</i>	<i>The Merry Wives of Windsor</i>	O. Nicolai
<i>Les contes d' Hoffmann</i>	<i>The Tales of Hoffmann</i>	J. Offenbach
<i>La Belle Hélène</i>	<i>The Fair Helene</i>	J. Offenbach
<i>Vaina i Mir</i>	<i>War and Peace</i>	S. Prokofiev
<i>La Fanciulla del west</i>	<i>The Girl of the Golden West</i>	G. Puccini
<i>Madama Butterfly</i>	<i>Madame Butterfly</i>	G. Puccini
<i>L'Enfant et les sortilèges</i>	<i>The child and the spells</i>	M. Ravel
<i>Il Viaggio a Reims</i>	<i>A Journey to Reims</i>	G. Rossini
<i>Barbiere di Seviglia</i>	<i>The Barber of Seville</i>	G. Rossini
<i>Die Fledermaus</i>	<i>The Bat</i>	J. Strauss
<i>Florenca en el Amazonas</i>	<i>Florence in the Amazon</i> (traduction Wikipedia US)	D. Catàn

<i>Der Rosenkavalier</i>	<i>The Knight of the Rose</i>	R. Strauss
<i>Un ballo in maschera</i>	<i>A Masked Ball</i>	G. Verdi
<i>Il trovatore</i>	<i>The Troubadour</i>	G. Verdi
<i>Das Mädchen mit den Scheffelhölzen</i>	<i>The Little Match Girl</i>	H. Lachenmann
<i>Die Meistersinger von Nürnberg</i>	<i>The Mastersingers of Nuremberg</i>	R. Wagner
<i>Die Walküre</i>	<i>The Walkyrie</i>	R. Wagner
<i>Götterdämmerung</i>	<i>Twilight of the Gods</i>	R. Wagner
<i>Die Soldaten</i>	<i>The Soldiers</i>	B.A. Zimmerman
<i>J'étais dans ma maison et j'attendais que la pluie vienne</i>	<i>I was in my house, and was waiting for rain</i>	J. Lénot
<i>Aufstieg and Fall der Stadt Mahagonny</i>	<i>Rise and fall of the City of Mahagonny</i>	K. Weil

Notes

1 Opera Houses: Order and Diversity

1. N. Payne, *Trends and Innovations in European Opera*, Written contribution to the book, 2009.
2. *Werspielte was?* (Cologne: Deutscher Bühnenverein, 2006–07, p. 74).
3. It is very noticeable that in German collective bargaining agreements, the size of the orchestra determines their classification in one of three groups A, B and C (more than 99 members, between 66 and 99 members, less than 66 members).
4. "Liceu, Un espacio para el arte" (Barcelona, Lunweg, 1999).
5. This concept is common in France and goes without saying in Italy. It corresponds to the concept of fixed costs as used in management control.
6. Statistics from *Opera America* for the 2006–07 season.
7. *Deutscher Bühnenverein, Theaterstatistik 2006–07*.
8. The following figures and tables exclude all non-opera activities and concern opera performances only.
9. In North America, Group 1 comprises the New York Metropolitan Opera, the Chicago Lyric Opera, the New York City Opera, the San Francisco Opera, the Los Angeles Opera and the Miami Opera. German Group 1 comprises the operas of Munich, Dresden, Hamburg, Stuttgart, Berlin Deutsche Oper, Frankfurt, Berlin Staatsoper, Mannheim, Köln, Düsseldorf, Hanover and Berlin Komische Oper.
10. This opera house structure explains the sampling choices made for the statistical analysis presented in the first chapter. The selected operas stage from 20 performances in Salt Lake City, or 22 in San Diego (both houses in Group 2), to 244 performances per season at the Vienna Staatsoper. This sample is an acceptable representation of opera houses from the first two groups, corresponding to 75 per cent of opera audiences, but cannot represent smaller opera houses and companies, some of which depend on the energies of enthusiastic amateurs rather than the skills of professional specialists. This choice should not mask the fact that the "small" houses cater to all of society and form the foundations on which the "large" houses prosper and grow.
11. However, this comparison must be moderated by consideration of the number of productions and operas programmed by these opera houses: a small number at Lausanne, the Théâtre des Champs Elysées and Théâtre du Chatelet, and significantly higher numbers at Prague Statni, San Francisco and Toulouse.
12. "Los Angeles Opera's Subscribers and patrons are people of superlative taste and discrimination who appreciate an exceptional performance, which is precisely what Audi delivers in its vehicles. We believe this sponsorship is a perfect match", Maria Nahigian, Audi of America, Los Angeles Opera website.

13. In 2010, things are not as simple as that. The Los Angeles Opera has had to be helped by the city of Los Angeles to benefit a \$15 million loan to be reimbursed in 4 years. For the Berlin Staatsoper Unter den Linden as will appear in Chapter 8, maintaining its image and identity is a must.
14. M. A. Scorca with Kelley Rourke, *Overview of the US Opera Landscape*, Written contribution to the book, 2010.
15. G. Uecker, *The German Opera Landscape*, Written contribution to the book, 2008.

2 Programming: Risk and Commitment for the Future

1. Available at <http://www.jmb-travel.co.uk>, the figures concern the years 2005 and 2006.
2. The list is: Verdi (*Nabucco*, *Rigoletto*, *La Traviata*, *Boccanegra*, *Falstaff*, *Don Carlo*, *Macbeth*), Puccini (*Tosca*, *La Bohème*, *Turandot*, *Madame Butterfly*), R. Strauss (*Der Rosenkavalier*), Wagner (*Parsifal*), Mozart (*Don Giovanni*), Rossini (*Barber of Seville*), Tchaikovsky (*Eugene Onegin*, *The Queen of Spades*), Bellini (*Norma*, *Capuletti*), Bizet (*Carmen*), Donizetti (*Lucia*), Offenbach (*Tales of Hoffmann*), Prokofiev (*War and Peace*).
3. There is a very high correlation coefficient (0.92) between the percentage of classics and auditorium size.
4. The correlation coefficient between the percentage of contemporary works and auditorium size is a negative -0.65 .
5. This opera was created in the New York Metropolitan Opera's grand auditorium, with Plácido Domingo in the title role.
6. Interviews with one of the authors, February 2008.
7. "It had the sound of one of those embarrassing vanity projects: An aging star persuades his favorite company to stage an obscure work as a vehicle tailored to his declining powers. Instead, the Metropolitan Opera's first-ever performance of Franco Alfano's *Cyrano de Bergerac* Friday night turned into an unexpected highlight of the season", *Associated Press*, 15 May 2005.
8. *Grand Théâtre de Genève*, 2001–09 (La Baconnière, 2010, p. 479).
9. Interview with one of the authors, November 2008.
10. Interview with the authors, April 2008.
11. In 2006, the value of *Tosca* in the Opéra National de Paris repertory was estimated at €3 million, and the whole repertory was valued at €120 million (Agid and Tarondeau, 2006, pp. 120–1).
12. Interviews with one of the authors, March 2009.

3 Artistic and Technical Production

1. In the Royal Opera House, 148 operas and 139 concerts were performed in the main theatre. The others were mainly performed at the Linbury Studio theatre: 84 operas and 125 ballets respectively.
2. The Opéra National de Paris is not a festival but it has been managed like one during the Liebermann years.

3. Conversation between William Mason, General Manager of the Lyric Opera in Chicago and one of the authors, November 2008.
4. Gérard Mortier, former manager of the Théâtre de la Monnaie in Brussels, the Salzburg Festival, the Rhur festival and the Opéra de Paris, and today artistic director of Madrid's Teatro Real.
5. In particular, the methods for measuring shares of fixed costs relating to sets, costumes and props.

4 Audience and Diffusion

1. "US main season box office revenue rises 11 per cent over 5 year period; ticket gap widens", Larry Bomback, director of finance and operations, *Opera America*, July 2009.
2. N. Payne, *Trends and Innovations in European Opera*, Written contribution to the book.
3. *Deutscher Bühnenverein Theaterstatistik, 2007–08*, pp. 98–9, 102–3.
4. Young audience programmes, study made by RESEO, September 2009, www.reseo.org.
5. Daniel J. Wakin, "Verdi with popcorn and trepidation", *New York Times*, 19 January 2009.
6. *Ibid.*

5 Architecture: Constraints or Opportunities?

1. Bayreuth has 74,000 inhabitants today, but the population in 1876 must have been no more than 30,000.
2. Large socialization areas were nonetheless created outside the theatre to keep pace with its growing success. The opera house is surrounded by gardens to the south and west, and two buildings were erected to house restaurants, one of which is also used as a rehearsal room for the orchestra, the chorus and the soloists.
3. Associazione Nazionale Enti Lirici e Sinfonici, *Dietro il sipario 1987–90* (Torino, pp. 61–2).
4. These quotations concerning the Dallas Opera were taken from the *Guardian* newspaper website, <http://www.guardian.co.uk>, 14 October 2009.
5. While our database tends to represent large opera houses, the average auditorium capacity is approximately 1,700 seats.
6. Michel Biesse, "Bastille An 10", *Opéra National de Paris*, July 1999.
7. Associazione Nazionale Enti Lirici e Sinfonici, *Dietro*, p. 53.
8. Ariane Bavelier, "La renaissance de l'Opéra royal de Versailles", *Le Figaro*, 18 September 2009.
9. Ricky Ian Gordon's *Orpheus & Eurydice* and Grigori Frid's *The Diary of Anne Frank*.
10. *The Richard Wagner Festival Theatre* (Marcus Kiesel, Nettpress, Köln, 2007, p. 201).

6 Funding Opera Houses

1. But it does for its touring activity in different cities in the southern part of England (46 performances, 6 productions in 2008, attracting an audience of 43,000 spectators).
2. Marc A. Scorca, opus cited.
3. Marc A. Scorca, opus cited.
4. Lyon, Bordeaux, Montpellier, Strasbourg (Opéra National du Rhin), Nancy (Opéra National de Lorraine). The Opéra de Paris also has the word National in its title.
5. The amount that can be subtracted from adjusted gross income, a tax deduction, will lower overall taxable income and thus lower the amount of tax paid. The amount deductible from taxable income depends, as in the USA, on the tax rates involved. For some higher-income taxpayers, such possibilities are very attractive. As in the USA, the creation or existence of private family foundations allows for the transfer of considerable inheritances to charitable causes. In the USA, it can minimize the estate tax liability.
6. *Réunion des opéras de France*, "Etat des lieux 2008".
7. William Mason, reported by John von Rhein, *Chicago Tribune*, January 2010.
8. Sixty-one individual donors and ten corporate firms, all members of the "Aria Society" of the Lyric Opera, provide annual gifts of at least \$100,000 each year. Five corporate firms and 12 individual donors (or foundations or family trusts) belong to the "Platinum Grand Benefactors". They contribute between \$50,000 and \$99,000. Twenty-three corporate firms and 60 individual donors are members of the "Golden Grand Benefactors" group. They donate between \$25,000 and \$49,999.
9. Forty-five donors, individuals or firms each donate more than \$100,000 every year, which totals \$4,500,000.
10. In Ligne 8, *Opéra national de Paris Journal*, 25, May–July 2009, interview with Flavia Gale, p. 56.
11. G. Uecker, opus cited.
12. In Section 8 of the *Theaterstatistik* books.

7 Governance, Organization and Management

1. Royal Opera house, *Annual Review 2007–08*, p. 5.
2. Meeting and discussion between Pamela Rosenberg and one of the authors, June 2009.
3. Meeting and discussion between Anthony Freud and one of the authors, November 2008.
4. Then general manager of the Théâtre des Champs Elysées.
5. Literally three parts: opera, ballet, spoken theatre.
6. Conversation with the authors, October 2009.
7. The finance committee meets four times a year, and always before the executive committee. The investment committee meets five times a year; it runs the "endowment" policy and portfolio. The audit committee meets twice to three times a year; it prevents conflict of interest between board members and the opera company. The compensations committee meets

- twice a year. The other three committees are: nominations and governance; lyric productions sponsorship; strategic planning.
8. Opéra Théâtre de Limoges, Opéra de Marseille, Opéra-Théâtre de Metz, Opéra de Nice, Opéra de Rennes, Opéra Théâtre de Saint-Etienne, Grand Théâtre de Tours, Théâtre de Caen, Opéra-Théâtre d'Avignon et des Pays de Vaucluse, Opéra National de Lorraine (Nancy).
 9. See *Table 6.4*.
 10. Season brochure 2009–10, p. 10.
 11. Presented on the French German Arte television channel.
 12. Once only, a board member representing a public administration asked why *Nabucco* and *The Magic Flute* had only six to eight performances. More would have meant more box office revenue, he said! Hughes Gall answered that he could boost the box office revenue if he would limit his annual repertoire choice to those.
 13. Luc Bondy's interview in *Le Monde*, 10 October 2009.
 14. Conversation with one of the authors.
 15. Conversation between Nicolas Joël and the authors, October 2009.
 16. German colloquial expression originated from the mining industry. Means "Good luck".
 17. In the programme of Massenet's *Manon*, season 2008–09, p. 12.

8 Tensions, Conflicts and Recent Crises

1. The design and pre-planning of the Opera Bastille between 1982 and 1989 were the source of many difficulties amply covered in the literature.
2. Some of the available space was turned into an orchestra rehearsal room in the early 2000s.
3. In the current affairs magazine *L'Express*, February 1989.
4. Conversation with one of the authors, December 2004.
5. The Bund is authorized to contribute to such expenses, but in principle not authorized to fund cultural institutions' operating expenses.
6. E. Gambert. *Externe steuerung der Stiftung Oper in Berlin* (Berlin, Universität Potsdam, Paris Université Panthéon Sorbonne and Ecole nationale d'administration, 2008).
7. Gérard Mortier was reported by Volker Blech in the *Berliner Morgenpost* of 17 February 2009 to have had four opportunities to come to Berlin. He was twice almost given a position at the Deutsche Oper. On another occasion, he was suggested as director of the Berliner Festspiele, and finally considered for the Staatsoper, but as he himself declares: "I was rejected four times". When invited to succeed Peter Mussbach as *Intendant* of the Staatsoper in January 2009, Gérard Mortier declared to French newspaper *Le Monde*: "Daniel Barenboim and I like each other, but you don't put two tigers to live on the same mountain."
8. €200 million financed by the Bund and 40 by the Berlin Senate. Then an additional €20 million will be needed to renovate the Schillertheater, which the Staatsoper will use during the renovation, due for completion in 2013 at the earliest.
9. Grand Théâtre de Genève 2001–09, p. 473.

10. *Ibid.*, p. 471.
11. Conversation between Pamela Rosenberg and one of the authors, April 2009.
12. Pamela Rosenberg contrasts the fragmentation of funding from a large number of donors, and the resulting time constraints, with the greater simplicity of European processes involving discussions with the small number of people who make public funding decisions.
13. Anyone interested in learning more about this aspect can examine the prologue to *Ariadne auf Naxos* by Strauss and Hofmannsthal. There are few pleas more eloquent in defence of “difficult” artists, more sympathetic to those who have to manage them or more benevolent in their description of situations that are human because passions run high! The miracle happens during the act following the prologue: the actors, in crisis in the prologue, combine their talents to bring to life a successful performance, which is also one of the authors’ masterpieces.

9 Performance, Strategic Options and Prospects

1. This matrix is constructed from data for the 2005–06 and 2006–07 seasons and may not correspond exactly to current situations.
2. One important point to note is that “contributed income” (predominantly public subsidies in Europe and private donations in North America) is not explicitly presented in these lists. Yet whether implicitly or explicitly, such income carries conditions and has an influence on opera houses’ strategic decisions, particularly in the case of public subsidies which are often channels for cultural policy missions or objectives.
3. Some of the orchestral services of the Nederlandse Opera in Amsterdam are financed by external budgets.
4. Discussion with one of the authors, spring 2009.
5. Discussion with one of the authors, February 2008.
6. *Grand Théâtre de Genève, 2001–09* (La Baconnière, Genève, 2009, pp. 469–73).
7. *Ibid.*, p. 479.
8. Several opera houses in the major European capitals have reduced their dependence on public funding, sometimes highly significantly, and increased their commercial income, starting with their box office income, while attracting not inconsiderable donations: Covent Garden, La Scala, Opéra de Paris, the two opera houses in Barcelona and Madrid, the Zurich Opera, the two Staatsoper in Munich and Dresden. Some operate almost without any public funding, for example, Glyndebourne and Baden-Baden, and at the other end of Europe, Belgrade’s Madlenianum Opera and Theatre in Serbia and Operosa of Evxinograd near Varna in Bulgaria are both entirely privately funded. There are also many small companies with variable activities and low overheads in several European countries, particularly Northern Europe, that do not match the dominant model.
9. M. Scorca and K. Rourke, *Overview of the US Opera Landscape*, Written contribution to the book, 2010 (unpublished).
10. *Ibid.*
11. N. Payne, opus cited.

12. This statement by Rudolf Bing can be understood in two ways: as an observation or as a wish. The observation, which is universally applicable, is an assessment of the facts, from Erfurt to Lyon, Seattle to Bregenz. The wish is expressed very differently according to the available resources, environments and managers' personalities. In the USA, the wish and the observation are generally identical.
13. Scorca, opus cited.
14. Discussion with one author.
15. G. Uecker, opus cited.
16. Payne, opus cited.
17. *Deutscher Bühnenverein*, Bundesverband der Theater und Orchester, <http://www.buehnenverien.de>.
18. Payne, opus cited.

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