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ARTICLE



Opera houses: from democratization to plutocratic control? Lyric production, economic management, and elite control in the main Spanish opera houses during the period of austerity (2009–2018)

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ABSTRACT

For 20 years, the main cultural institutions in Europe have faced new challenges such as increasing their efficiency in terms of the use of public resources. However, while operas found themselves under financial pressure during the period of spending cuts starting in 2009, another logic emerged that undermined attempts to govern them in a democratizing way. Under this new paradigm, the dynamics of governance in the large operas were privatized in exchange for increased private patronage. Our analysis of the changes in the management processes of the two main opera houses in Spain showed that neither of them were private or public, but rather, they were both hybrid organizations at the service of plutocratic elites.

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Opera theatres; cultural management; cultural policy; new public management; artistic autonomy; elite; Madrid; Barcelona

Introduction

The governance of the largest cultural institutions in general, and especially of opera houses, has received increasing attention from researchers of the economics of culture and cultural policy (Auvinen 2001). These are the most complex organizations within the cultural sector, and they also have the largest and most heavily subsidized budgets (Agid and Tarondeau 2007). This makes them the subject of political and media debate about the utility and legitimacy of the public subsidies they receive, and this scrutiny grows especially intense when they incur large budget deficits. Indeed, these cases spark public debate about whether to continue contributing public funds to opera houses and about the need to increase management controls and better define their objectives (Towse 2001). However, these debates are being held without analyzing the possibilities of governing these cultural institutions in the sense of reorienting their missions to ones beyond their traditional artistic objectives as set out in past research in this field (Rius-Ulldemolins and Rubio 2013; Towse 2001)

Research into the management of arts organizations has come a long way over the last 30 years (Evrard and Colbert 2000; Paquette 2019). In particular, special attention has been paid to studying the role of the public financing of large theaters, operas, and museums in terms of fundamental factors such as economic viability (Baumol and Bowen 1966) or their influence on artistic activity (Krebs and Pommerehne 1995). Less attention has been paid to the relationship between political decision-makers and the management of arts organizations that receive public funding. Some studies have analyzed the complexity of defining and agreeing upon new projects for large opera organizations (Urfalino 1990), the problems of establishing such objectives, and evaluation of

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existing opera institutions within a complex framework of governance (Towse 2001). Likewise, the different governance schemes established between the state and the major opera institutions, as well as the importance of artistic and managerial autonomy to create shows of high artistic quality which receive positive public evaluations, have also been examined (Krebs and Pommerehne 1995).

As Zimmer and Toepler (1999) pointed out, the degree of state involvement in cultural policy in general, especially in large artistic institutions, is explained partially by the economic characteristics of the performing arts – its high production costs and uncertain success, and with it, structural dependence on public funds – but especially by the differential progression of institutional configurations in developed countries. In continental Europe, since the postwar period, this configuration has assigned the State a preponderant role in the management of opera houses, as their main financiers. In turn, this has led to a paradoxical situation during the second part of the 20th century: a high level of economic dependence on public administrations combined with strong autonomy in the formulation of cultural activities. This configuration was legitimized by the symbolic capital of the artistic field, which was typical of cultural modernity (Bourdieu 2002), and by the tradition established at the international level in the mid-19th century of elite cultural institutions oriented towards artistic excellence. Opera houses form one of the main elements of this tradition and generate an international field of experts and amateurs who follow the managers and artistic lines of theaters with interest and critically evaluate them (Martorella 1982; Benzecry 2012). In any case, an intense struggle for the control of organizations and the definition of their identity and missions has developed around large artistic organizations (Kleppe 2018).

The configuration of cultural institutions in continental Europe, broadly found in southern Europe, has defined the role of governments as mere ‘fund providers’ without the legitimacy required to intervene in the management of these facilities. This situation lasted until the end of the 20th century, when a trend towards greater control by elected politicians started to come into play (Dubois 2010; Dubois et al. 2012). This was coupled with a decrease in the emphasis placed on the ‘charismatic power’ of artistic directors when defining the activity of these institutions (Mangset, Kleppe, and Sigrid 2012). Therefore, to correct this situation and enhance the efficiency of private revenue generation, the management model of lyrical theaters has been modified in some countries by moving away from the tutelage of public administrations towards a foundation configuration (Leon 2004; Sicca 1997). In Italy, these attempts have largely failed, with only the largest and most important theaters managing to reduce their reliance on public contributions (Fontana 2010). However, these reforms only affected economic management, without rethinking the objectives and activities of opera houses. Thus, implementing such management transformations without modifying the traditional mission of producing and exhibiting high-quality operas produced a deep financial and institutional crisis in most of the Italian lyrical establishments (*idem*).

Another difficulty in studying the management of opera houses is that there appears to be a tension between opera management and their artistic direction and artists that establishes an internal complexity and conflict which characterizes these organizations (Auvinen 2001). Opera houses are like other large institutions in terms of several characteristics such as their dependence on public funds and their status as figureheads in the cultural policy of excellence. However, several characteristics differentiate them, including the (a) relatively large size of their facilities and their organizational complexity; (b) high proportion of permanent and temporary artistic personnel (symphony orchestra, choir, singers, etc.) and technical personnel (Auvinen 2001); (c) high cost of opera projects (Rius-Ulldemolins 2020); (d) institutional framework comprising local and global communities of fans and an international network of operas (Benzecry 2012; Martorella 1982); and (e) fact that they are cultural institutions with rigid definitions of their missions and a traditional orientation towards artistic excellence (Agid and Tarondau 2007). The sum of all these characteristics creates a complex system of governance in which tensions emerge between the dimensions of artistic, economic, and public value. All of this speaks to their uniqueness, which significantly differentiates them from other large ‘cultural complexes’ such as national museums.

This opposition leads to the development of different logics and values corresponding to conflicting functional areas for these artistic organizations (Chiapello 1998; Kuesters 2010) and represents two logics for their direction (Cray, Inglis, and Freeman 2007). In addition, since the end of the 20th century, there has been a third area of conflict related to public management; opera houses have progressively gained autonomy as management spheres with their own objectives, while public administrations and trusts have introduced new goals and respond to the complex demands of their trustees (DiMaggio 1987; Peterson 1986; Røyseng 2008; Kuesters 2010). Thus, various strategies were developed which combined power as a legal-rational authority based on the social networks and social or professional groups they represent (Paquette and Redaelli 2015, 55; Rius-Ulldemolins 2014). Therefore, analyzes should consider not only the internal aspects of management, logics, or discourses, but also any factors related to the institutional context and social structure in which these artistic organizations are situated.

One of the first elements to consider is the importance of cultural policy in artistic institutions; this factor differs over time and according to the administration (Dubois 2015; Rius-Ulldemolins, Pizzi, and Arostegui 2019). Thus, although in Europe the State is often the main financier, it does not directly govern cultural facilities in the traditional sense of the word. Thus, compared to trustees, the Ministry of Culture took on a secondary role in artistic and managerial direction decisions both in Italy (Paola and Monti 2018) and Spain in the 21st century. Therefore, the control of cultural institutions is understood as a system of shared governance (Agid and Tarondeau 2007, 4). This definition is synonymous with that of guardianship and does not imply the implicit ability of government to modify the mission or the lines of activity of opera theatres. In addition, within the framework of the theory of agency, there is a strong asymmetry in the information available to the 'principals' (in Europe, normally the public administration and facility owners) and the 'agents' (the large cultural facilities). In this sense, to a large extent, governments depend on the information provided by the agent leadership or the expert panels that advise them (Loots 2019), with the latter acting as invisible academies of cultural policy (Menger 2017).

For all these reasons, some aspects of the decision-making power that political leaders have over the activities and management of large artistic institutions have been poorly studied. Similarly, a knowledge gap related to economic and management constraints can also be added to the current discourse on the autonomy of art, which thereby limits the capacity of governments to intervene (Blomgren 2012; Røyseng 2008}, especially in the case of operas (Paola and Monti 2018). In this article we argue that, although great pressure has recently been exerted via cultural policies to reorient these types of cultural institutions, especially to reduce their dependence on public funding (Sherer, Suddaby, and Rozsa De Coquet 2019), in reality, their objectives and management modes have changed relatively little. Thus, the evolution of these facilities is becoming more distanced from both democratizing cultural policy objectives and the promotion of creative innovation. Rather, they appear to be concentrating on their relationship with political-institutional elites (political leaders and senior officials) and economic partners, which we could term a public-private space hybridization (Rius-Ulldemolins 2016).

Given the above, rather than focusing on external variables of change such as the rational intentions of public policy (which often encounter organizational obstacles), here we start from the hypothesis that structural variables related to the availability of resources (or their absence in the case of the crisis in Spain) are growing in importance and that operas are becoming dependent on elites as causal factors in their changing management practices. Thus, we posit that the theories of the autonomy of the Bourdian field (the institutionalist approach) must be updated within the framework of (a) the greater autonomy enjoyed by artistic organizations with respect to political power (Kleppe 2018; Sherer, Suddaby, and Rozsa De Coquet 2019) and (b), the greater heteronomy and interdependence of the elites of global cultural capitals such as Barcelona and Madrid (Rius-Ulldemolins, Rubio Arostegui, and Flor 2021; Degen and Marisol 2012).

Within this structure, here we studied the two largest opera houses in Barcelona and Madrid, the Gran Teatro del Liceu de Barcelona (GTL) and the Teatro Real de Madrid (TR) as advanced examples of

this trend. We then examined why the economic conditions and management of lyrical theaters limit their ability to modify their own objectives and activities within the structure of the successive program contracts signed between titular public administrations and the management of these cultural institutions. Likewise, this article aimed to document the evolution of these facilities in the context of the age of austerity (2009–2019) when public funds destined for large facilities in Madrid and Barcelona were cut by almost 30% (Rius-Ulldemolins 2016) and the audience of operas fell by 35%. In the period we analyzed, opera consumption in Spain (SGAE 2020) went from 1.20 million (2009) to 0.78 viewers (2019).

This article was based on the results of research on cultural policy in Spain led by the authors and financed by the Ministry of Science and Universities (*excerpt removed to anonymize the text*). The Project encompassed the analysis of the cultural policy of three large cities: Madrid, Barcelona, and Valencia, especially the tensions caused by their shift towards the ‘creative city’ model, as well as the impact of the 2008 crisis. The work was based on data from performance memorandums, budgets, and cultural consumption, as well as interviews with political and artistic leaders, with this latter dimension being severely constrained by the impact of the COVID-19 pandemic.¹ In this context, we focused our analysis on the study of three cases of central relevance given that these institutions received the most public funding for performing arts in Spain during the period considered (Rius-Ulldemolins 2016), namely the TR, GTL, and Palau de les Arts de València, with the first two cases being the object of this comparative article.

This work included an analysis of the content of the government documents regarding these cultural agencies and a detailed study of their budgets and the controversies generated in the general press and specialized media related to opera. The following data were collected and analyzed in the preparation of this article: (a) The documentation available on the GTL in the files available from both the General Sub-Directorate for Cultural Facilities and the Technical Cabinet of the Department of Culture of the Generalitat de Catalunya: the budgets of the incumbent public administrations, GTL’s annual budgets and performance reports, and studies prepared by the GTL itself; (b) likewise, we analyzed the TR based on documentation available on their website, in the Official State Gazette, and data from patronage and public financing studies we had previously carried out (*excerpt removed to anonymize the text*). In this article we took a case analysis methodological approach (Flyvbjerg 2006) with the aim of reporting the singularities and variations of the Spanish case compared to contexts in Western Europe, although we did not carry out any comparative analyses.

Cultural policies, artistic management, and large cultural institutions

Cultural policies in Europe since the end of the 1990s have become increasingly aware of the importance of large public artistic institutions and of the extremely limited capacity of principals to truly intervene in their governance and management (Coppinger et al. 2007). Hence, governments have insisted on improving their control and evaluation mechanisms for cultural organizations, the latter of which include program contracts. Several factors explain this phenomenon. First, the number of large cultural organizations dependent on public financing, as well as their budgets, have grown (Rius-Ulldemolins and Rubio 2013). Furthermore, a lot of spending is concentrated in a small group of cultural institutions, especially in opera houses. In France, the Opéra National de Paris received about 95 million euros in 2018, representing 13% of the government’s creative budget (Opéra National de Paris 2019; Ministère de la Culture 2017). Similarly, the Royal Opera House in England received about 24.7 million euros in 2018, representing 7.1% of the total National Portfolio Grants (Arts Council England 2019). However, the large number of resources received by these institutions through patronage must also be added to the direct public financing they receive. Moreover, because of a series of laws and regulations, these resources are largely exempt from the tax contributions their large donor companies would have otherwise been obliged to pay. Thus, by capturing much of this patronage via powerful fundraising teams, these cultural facilities are in fact

indirectly receiving public funds and subtracting them from other potential recipients in the cultural or social realm.

Second, in a process that has been interpreted as an instrumentalization of cultural policy, these large organizations have been entrusted with objectives that go beyond the performance of their traditional artistic activities (Gray 2007; Belfiore 2004). Some of them have been conceived as agents of urban regeneration policies, mechanisms of social integration, or the economic promotion of territories. This model originates in Great Britain (Bianchini 1993), but from the 1980s onwards has been implemented in other large and medium-sized cities including Barcelona (García 2004; Degen and Marisol 2012). This broadens the mission of these institutions because it adds new objectives to their old ones and places them more centrally within public policies as major events designed to generate cultural value and a social and economic impact (Patricio-Mulero 2019; Colombo, 2017). However, this also entails greater complexity in their governance and means that among other factors, each organization's management must also satisfy various cultural, social, and economic objectives that are not easy to reconcile (Gray 2008; Kleppe 2018)

Therefore, cultural policies in general and specifically, the management of cultural organizations, are increasingly subject to scrutiny by policy makers, legislators, and public opinion (Towse 2001; Gray 2007; O'Brien 2015). Furthermore, the response to this pressure (which has been aggravated by successive cuts in the public funding for culture) has not been the establishment of previously negotiated evaluation formulas for public-value results metrics. Rather, it has resulted in the generation of private entities and a real-terms increase in the privatization of these spaces along with their reorientation towards instrumental purposes such as the generation of patronage or cultural branding (Sicca 1997; Rius-Ulldemolins and Rubio 2013; Kawashima 1999).

The case of the Liceu: increasing complexity and friction between lyrical production, economic sustainability, and the public mission

The transformation of the mission and management of the Gran Teatro de Liceu de Barcelona: from a bourgeois opera theater to the 'Liceu for everyone'

From its origin, the GTL was not publicly owned. Rather, for a century and a half it was a private entity, which partly explains the complexity of its governance by public administrations now. The GTL was created in 1847 upon the initiative of prominent members of the Barcelonan bourgeoisie and the construction of its Las Ramblas building was financed through commercial actions of the Liceu Grand Theater Society. This management model lasted until the end of the 20th century, a time when the great opera houses in advanced countries were either public or received large subsidies from the State (Martorella 1982). During the transition to democracy, the GTL had already become the object of criticism from progressive sectors that had diagnosed the decline of the model and branded it obsolete and elitist (Alier 1978). This situation threatened the continuity of the theater and forced the Department of Culture of the Generalitat de Catalunya (which had only been established in 1980), to intervene and create the Consortium of the Gran Teatro del Liceu. The Barcelona City Council and the Gran Teatro del Liceu Society (which held ownership of the property until 1994) also participated in this intervention, which was later joined by the Barcelona Provincial Council (1985) and Ministry of Culture (1986).

However, in 1994, a fire destroyed the auditorium, except for the façade and adjoining rooms, and a strong consensus was immediately generated among the economic, cultural, and political elites on the need to rapidly rebuild it (Pla 2000). However, there was no concurrent debate about the right model for this cultural institution and its future role within the Barcelonan cultural system. Consensus regarding the importance of the GTL was reflected in the constitution of the new Gran Teatro del Liceu Foundation, comprising the four public administrations mentioned above, and culminating in confrontations between them over

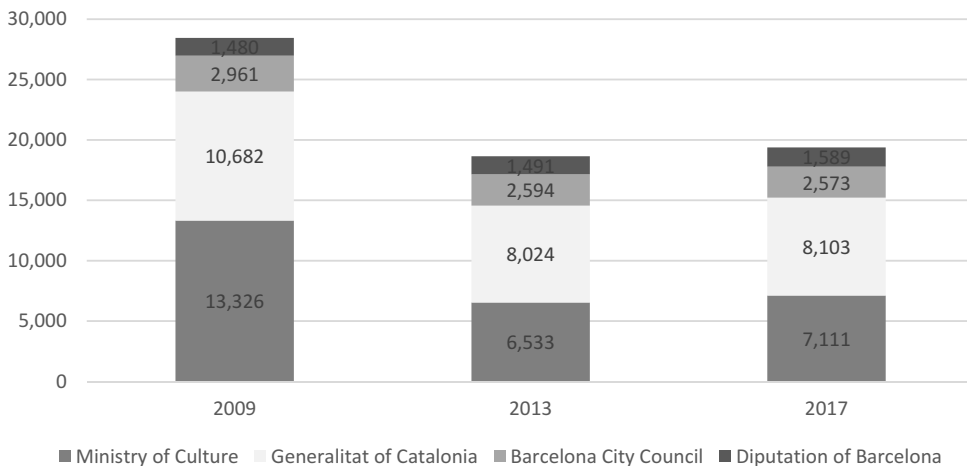


Figure 1. Public financing of the Gran Teatre del Liceu (in 2009–2013 and 2013–2017), in thousands of euros.

cultural competences (Font 1991). Thus, lobbying by civil society associations led to the immediate establishment of an intergovernmental commission that managed to rebuild the entire building in only five years, with its reopening in 1999.

The new GTL, with a capacity for 2,292 people, went from 12 to 32,000 m² and cost 88.3 million euros, which came mainly from public administrations and led to the public ownership of the building. However, there were also significant private contributions amounting to 25% of the total spending. This resulted in the institution's new management model, the GTL Foundation, in which sponsoring companies had a voice and vote on the Board of Trustees and the Executive Commission through the Patronage Council. This Council served as a link with large companies (mainly in the construction, finance, or media sectors), which have since contributed considerable funds to the GTL Foundation. Therefore, the Liceu's new management paradigm was remarkably close to that of a hybrid cultural institution model which is neither public nor private (Rius-Ulldemolins 2016).²

The GTL's reopening was presented under the slogan 'The Liceu for everyone' (as opposed to its previous connotation as the 'Liceu of the elites') as a means to legitimize the high levels of public investment that its reconstruction and expansion had entailed. At the time there was political will to democratize the publics of this operatic institution (Caminal 2004), which meant opening new cultural mediation activities (for example, by implementing its educational program, the Petit Liceu, aimed at children) as well as lines of activity designed to expand the social diversity of its public (such as reduced-price golf sessions in its foyer, among other activities) (Figure 1).

Therefore, since the GTL's reconstruction and its definitive conversion into a large public arts organization, it has become one of the crown jewels of Barcelonan and Catalan cultural policy and is now the second most used facility in Catalonia in terms of spectators (ADETCA 2019). The GTL also stands out for its economic dimensions: it was the first cultural entity to receive public funds from Catalonia, with its budget increasing from 34 million euros in the 1999–2000 season to 55.7 million euros only ten years later in the 2009–2010 season. However, the economic crisis and subsequent cuts in public resources were incredibly significant for the Liceu, resulting in a funding reduction of nearly 27% in less than four years, to 40.7 million euros in 2013. Likewise, during the economic recovery in the

subsequent five years it did not recuperate the same public resources, with only three million euros being added back to its budget to reach a total of 43.7 million euros in 2017.

The economic and management constraints placed on the Liceu by the government: the impact of the crisis and its structural limits

As one of the main opera houses, the GTL has important economic and management inertias that limited the capacity of its strategic governance. First, it had a remarkably high fixed-cost structure (at over 60%); together with loan payment and financing expenses, there was little room left for maneuver for its main activities (constituting only 28% of its overall budget). Most of its structural expenses covered the cost of personnel: the GTL had a staff of 474, accounting for a total expenditure of more than 26 million euros. Moreover, there had been a 35% increase in staff (from 352 people to 474) between 2002 and 2010 followed by a sharp drop to 389 in 2013 and 306 in 2017 within the framework of austerity. This reduction, together with a 5% cut in the salaries of the remaining staff, led to notable unease among the workforce and labor strikes that paralyzed artistic activity during the start of the 2011–2012 season. Thus, the personnel cuts ended up seriously affecting the artistic area, including the choir and permanent orchestra which represented 80% of the entire GTL staff and 79% of its expenditure on human resources.

However, it is worth noting that during the 2009–2010 season, in which the GTL had a 55.7-million-euro budget, it generated 549% of its own total income, which was well above the 32% average for other theaters and auditoriums in the Barcelona area (Diputació de Barcelona 2008). This was due, in part, to its ability to attract sponsorships and high levels of income from the theater box office. Indeed, after the cuts, these contributions (45.7% in 2013 and 44.3% in 2017) represented a higher percentage of their budget due to a decreased proportion of public contributions (Fundació Gran Teatre del Liceu 2014, 2018) (Figure 2).

At the time of the crisis, there was a perfect storm in the form of a brutal reduction in public contributions (from 28.4 to 18.6 million euros) accompanied by a simultaneous drop in private contributions and income

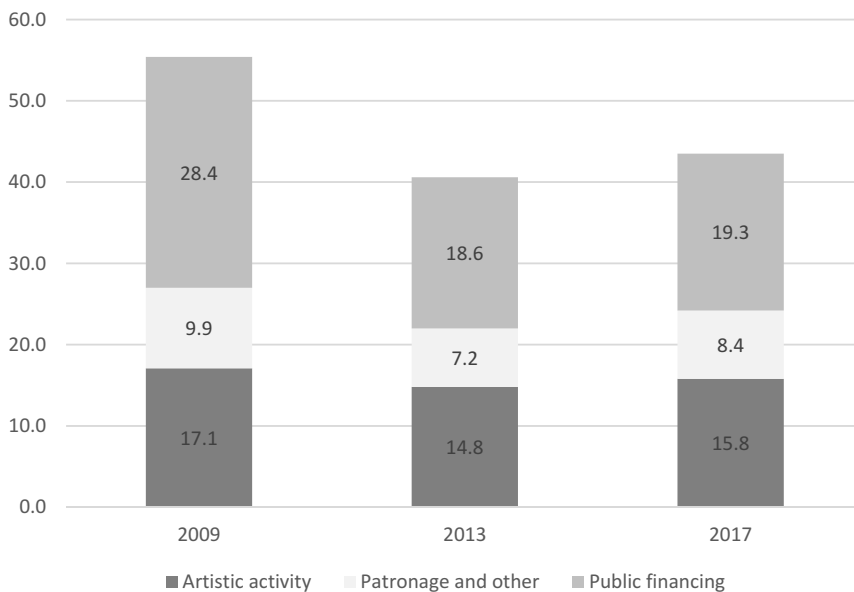


Figure 2. Total financing of the Gran Teatro del Liceu (in 2009–2013 and 2013–2017), in thousands of euros.

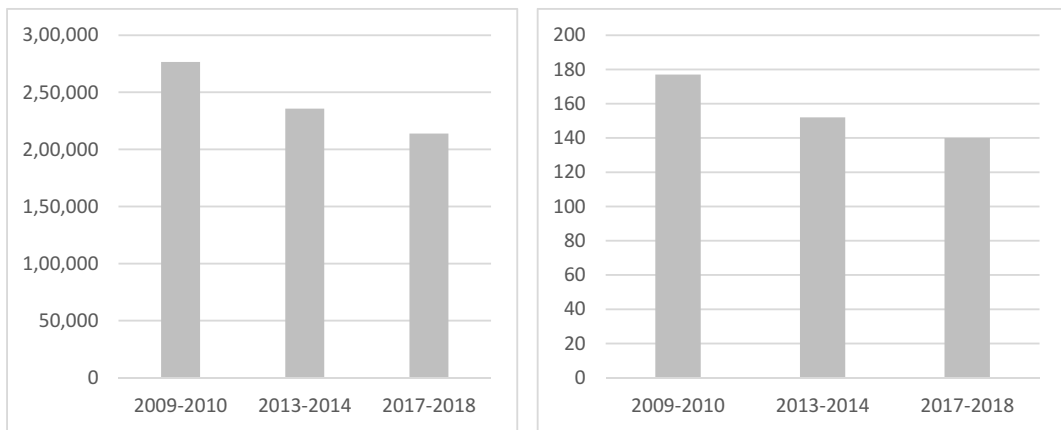


Figure 3. Ticket sales and the number of sessions at the Gran Teatro del Liceu (2009–2017).

from artistic activity (subscriptions and sales of artistic output). While the Liceu collected the most contributions from private sector sponsorships from among all the Catalan organizations, this only represented 16% of its total income, indicating that the civil society commitment to the GTL was exceedingly high. Moreover, it had very little margin for an increase in its box office receipts because its occupation rate over the past ten seasons had been over 90% (ADETCA 2019). It also had a very loyal public, represented by an advance annual subscription sales rate of 60%. Thus, attempting to increase box office incomes would have meant increasing its activity; in other words, scheduling more works and functions which would also have risked increasing its overhead costs above its income. This is because it would have meant having to pay overtime to technical and artistic personnel which – as mentioned earlier – was one of the GTL’s largest expenses. Likewise, one of the effects of the crisis and its aftermath was a reduction in ticket sales because of the effect of programmed functions (Figure 3).

The Liceu’s instruments of government: from direct supervision to program contracts

In general, the economic and organizational complexity of large cultural organizations is considerable and often extends beyond both the expertise of policymakers and the time they can devote to supervising them. In the case of the Liceu, the organization is controlled by public administrations, at least at the theoretical level. Ownership and votes on the Board of Trustees and the Executive Commission are distributed according to the percentages established by the GTL’s statutes; a proportional relationship is also maintained for financial contributions as follows: the Ministry of Culture (45%), Generalitat of Catalonia (40%), Barcelona City Council (10%), and Barcelona Provincial Council (5%). Public administrations appoint the Director General, who in turn appoints the Artistic Director based on the proposal of an artistic advisory commission. Consequently, considering the fragmentation and organizational weakness of the public administration, alongside the aforementioned economic and management constraints, there would have been very little capacity to govern the GTL if it were not for program contracts. Thus, since the end of the 1990s, public administrations have tried to convert these contracts into true long-term strategic governance tools.

The GTL’s first program contract was drawn up and signed in 1998, shortly before its reopening in 1999 following the 1994 fire. Rather than constituting a document that defined strategic objectives, it focused on setting the contributions from public administrations over four years – an element that dominated the negotiation. In fact, the budget agreements were accompanied only by a reminder of the Liceu’s mission (as defined in its statutes) and the formulation of generic and easily achievable activity objectives. An attempt was made to correct this in 2004, when the second program contract for the 2006–2009 period was negotiated and signed. This contract

was organized in four sections: objectives and programs, budgetary policy, human resources, and patronage; it specified, for the first time, the theater's objectives and performance goals and provided guidelines for human resources management, in exchange for an increase in public budgetary contributions.

Ambitious plans were laid to diversify the GTL's activity related to its objectives and programs, seek synergies with other public sector agents (such as the TR in Madrid), and use the media and new technologies to reach new audiences, especially young university students. However, a high level of non-compliance meant that the conception and drafting of the subsequent program contract between the public administrations and GTL was revised. In the third 2010–2013 program contract, progress was made by defining nine strategic objectives, three of which referred to programming (guaranteeing its diversity and promoting local lyrical heritage and new creation), two to the public (digital broadcasting and educational programs), and the remaining elements being related to management. However, all these were abandoned with the crisis and subsequent cuts, leading to an accumulated deficit of 14 million euros in 2013, a quasi-paralysis in artistic activity, and prioritization of old and commercial operas to decrease costs and maximize income without having to consider artistic or public value objectives.

Despite the development of new governance tools, the GTL was still largely managed by its Director General, Joan Francesc Marco (2008–2013), a key figure designated not for his career in the operatic world, but for his connections with the highest levels of the administration. He was chosen principally because of his membership in the then ruling PSOE party, his career at INAEM (a Central Organ of the Ministry of Culture), and his previous responsibility as the administrator of the National Theater of Catalonia in the first socialist government (2003–2006). Marco's main function was not economic management (which was carried out by a manager) or artistic management (the goal of the artistic and musical directors), but rather, political management of the GTL. In other words, lobbying Catalan deputies in Madrid to negotiate amendments to the budgetary laws and stop the cuts, as well as public relations work in Madrid to present the season alongside the Minister of Culture. However, the withdrawal of half of the GTL's funding and the loss of confidence in the political capital precipitated his fall, starting in 2012 (Figure 4).

From 2013, the GTL embarked on a new markedly entrepreneurial business trajectory, reflected by the installation of two successive directors: Roger Guasch (2013–2018) and later, Valentí Oviedo (since 2018),

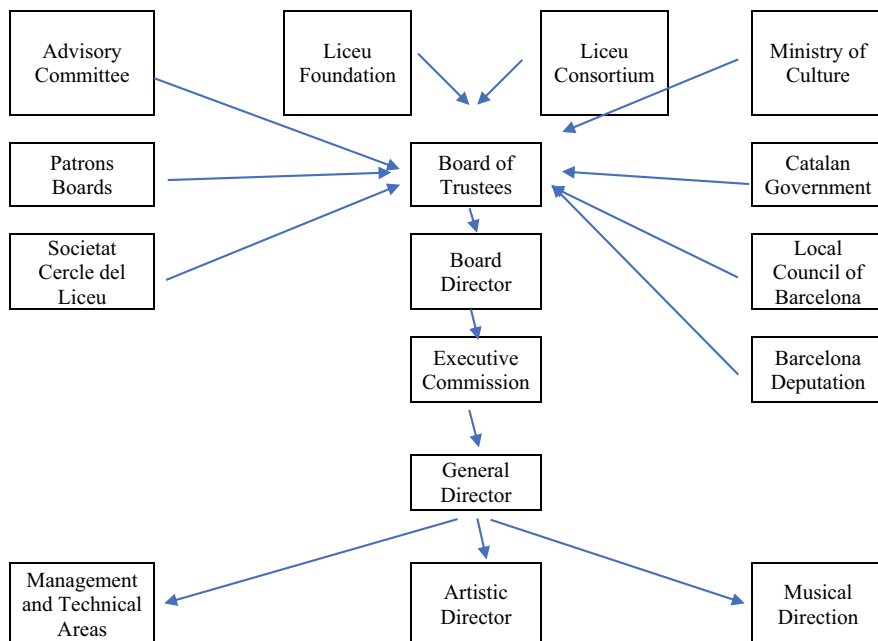


Figure 4. Governance organization chart for the Fundació Gran Teatre del Liceu (2018).

who had trained in the elite IESE and ESADE business schools, respectively. This change in direction required hard management adjustments but strengthened the GTL's relationships with large companies. These businesses were also present in its Patronage Council and their role was reinforced during the crisis with a board of directors headed by the representatives of a leading Spanish multinational (Telefónica) and two of the main Spanish banks (Banco Santander and La Caixa). In this sense, the figurehead of the GTL's President (Salvador Alemany) as a leading Catalan businessman was the focal point for conflict at the Liceu which ended in the dismissal of the Director General and Artistic Director (Roger Guasch and Cristina Scheppelman). This was the result of a diagnosis by the President and other members of the Foundation's Board of Trustees that the GTL was not capable of meeting its artistic expectations and that its stance in relation to the State, as well as its position in the international arena, were unsatisfactory (Martínez 2019). Likewise, the elitist sector of the Board of Trustees considered heterogeneous and commercial programming unacceptable and had the opinion that this had been a factor contributing to the institution's lost status. This increased presence of institutionalists and control by the business elite was later made official with the election of the former director of the Patronage Council – Alemany – as director of the Foundation.

The Teatro Real: the great theater of the capital

Teatro Real: from absolutism to the auditorium of the capital's elites

The opera in the political capital of the Kingdom of Spain was created as part of the full restoration of absolutism by Fernando VIII who thus, wanted to emulate the great European coliseums of the early 19th century (Turina Gómez 1997). However, its construction suffered from the institutional and political instabilities of the time and the works went on for more than 30 years before the building was finally inaugurated in 1850. The TR became a relevant opera house from the beginning of the reign of Isabella II (1833–1868) and during the second Bourbon restoration (1874–1931). However, in 1925 the severely damaged building partially collapsed, and it closed for more than 40 years. The TR did not resume its activity until the 1960s under the Franco dictatorship when it became an auditorium for the Spanish National Orchestra and the headquarters of the Higher Schools of music, theater, and dance.

In 1997 the TR was redefined as an opera theater at a time when central government was investing in culture as part of a strategy to relaunch the branding of Spain, with Madrid as its cultural capital (Rius Ulldemolins and Zamorano 2015). By then, the capital of the Kingdom had lacked an operatic tradition since the 1920s. However, artistic demand was not the main motivation for this investment, rather, it was the diagnosis that 'Madrid needed an opera theater that was comparable to the best ones in the world' (Fundación Teatro Real 2020). Hence, in an effort to put Madrid on the map of the great operatic capitals 'no matter the cost', the Ministry of Culture financed the new building work and turned the TR into a stage coliseum with a capacity of 1,750. This made it the best financed in the State, above other cities that already had an operatic tradition and thus, reflected its centralist conception inherited from Spanish absolutism (Arostegui and Arturo 2003; Bouzada 2007).

Comprehensive rehabilitation work was carried out on the building from 1988 to 1997 to modernize it, converting its 71 m² into an auditorium adapted for late 20th century opera without renouncing its status as a social stage to see and be seen (Rodríguez de Partearroyo Conde 1996). A tendency also developed to separate the management of its public guardianship from its artistic direction, as reflected in the constitution of a Foundation, in 1996, which admitted the building's management free of charge. This management autonomy was emphasized (by assimilating it into other charitable foundations) in a subsequent reform in 2007, which saw the TR's human resources being controlled separately from those of its general administration. This was done after a speech by the New Public Management on the defects of traditional public administration management. However, unlike Catalonia, they failed to develop control tools and its strategic plans (such as the one drawn up in 2019) were not made public; these were seen as tools for internal planning rather

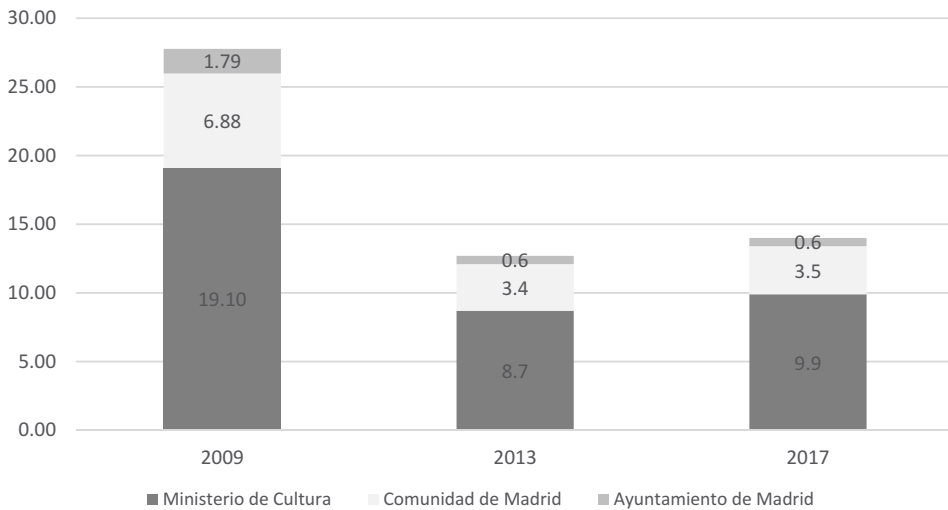


Figure 5. Public financing of the Teatro Real (2009–2013 and 2013–2017) in thousands of euros.

than for generating and enhancing public value. Likewise, the meetings of the Board of Trustees were highly ritualized, some of them chaired by the King himself, and there is no evidence of accountability either from the managerial or artistic parties.

A budget under the pressure of cuts with a private exit key

Just as for the GTL in 2009, at the beginning of the crisis, the TR saw a very sudden reduction in its opera theater budget (from 49.7 to 36.5 million euros) at the peak of the cuts in Spain in 2013. However, the TR saw a very significant increase in patronage (from 4.3 million in 2009 to 17.1 million in 2019) by the time the crisis had come to an end (Figure 5).

The RT is now essentially a central government installation because it receives most of its revenues from public funds. While its financing was more than halved from 2009 to 2013 (recovering only slightly from 2013 to 2019), its funding by the Community of Madrid still represented half of all that awarded in 2019. Moreover, the Ministry of Culture financing destined for the TR remained by far the highest of any theatrical institution in Spain, representing 48% of transfers in this field alone (Ministerio de Economía y Hacienda 2019).

The case of the Teatro Real: managerial control, artistic autonomy, and structural constraints

As mentioned above, the TR suffered cuts of almost half its public revenues during the economic crisis and austerity period in Spain. Together with the drop in income from artistic activity, this led to a revenue decrease of 11 million euros between 2009 and 2013 and represented a 22% decrease in only four years. The problem of the opacity of auditoriums such as the TR, as well as their cost-per-user ratio, arose in this context, consequently leading to difficulty in terms of its public legitimacy. However, the theatre's audience rallied against this pressure to attract private resources which thus, almost quadrupled from just 4.3 million in 2009 to 17.1 million in 2017 (Figure 6).

The effect of the crisis can also clearly be seen as a halving in the number of spectators between 2008 and 2015, with a partial recovery in 2018. However, the number of subscribers did not similarly recover, as seen in a drop from 28,000 to just 20,000 between 2008 and 2018 (Figure 7).

Of note, 70.8% of the tickets sold in the 2016–2017 season corresponded to subscribers, meaning that the main beneficiaries of the TR were these 20,000 or so subscribers (Teatro Real 2018), accounting for

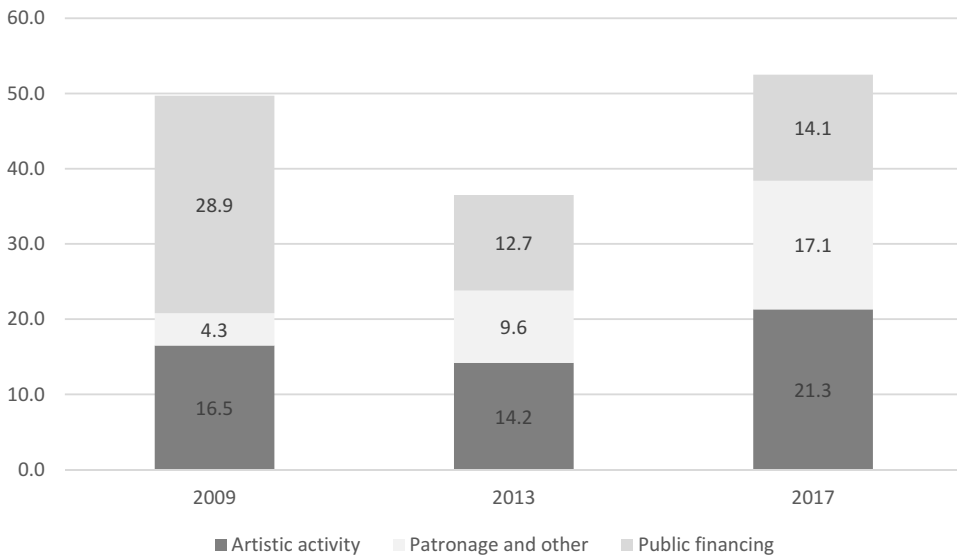


Figure 6. Income of the Teatro Real (2009, 2013, and 2017) in millions of euros.

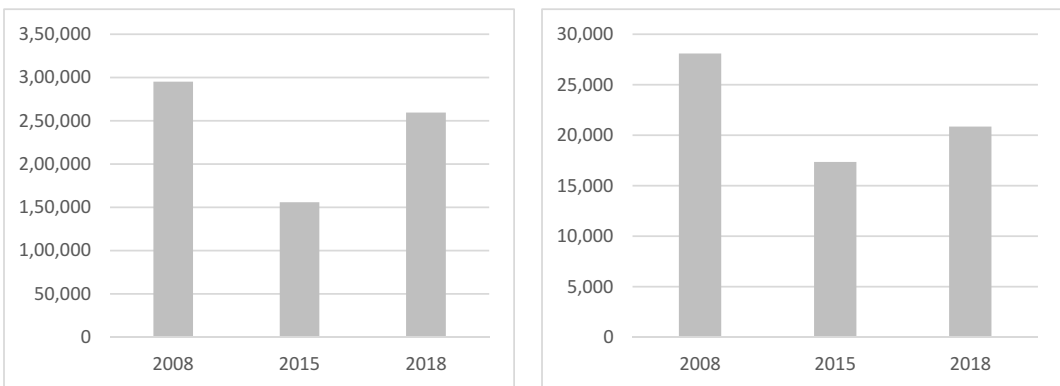


Figure 7. Ticket sales and annual subscriptions to the Teatro Real (2008–2015 and 2015–2018).

70.1% of all the tickets sold, and meaning that the real cost per subscriber was 1,765 euros. Thus, without a doubt, one of the greatest innovations in the management of the TR was this sizeable increase in patronage (more than doubling that of the GTL). This was previously unheard of in the field of arts in Spain given its scant tradition of private patronage (Rubio Arostegui, Rius-Ulldemollins, and Martínez-Illa 2014).

However, this change can also be read in a slightly less disinterested way than that presented in institutional memoirs and discourses. This is because the board of trustees of the TR includes many senior managers of large companies, and their participation grew in line with the importance of the TR's private income as well as with its remarkable ability to raise funds. Indeed, prominent positions as corporate patrons are now held by the former state monopolies (currently managed by regulatory entities based in Madrid), such as Telefónica and Endesa, companies with public participation such as Bankia, Feria de Madrid, RENFE, and Aena, and large infrastructure companies such as ACS, Ferrovial, OHL, and Abertis. Thus, this patronage seems to be linked to public relations policies, mainly directed towards their main governmental clients; for example, the construction companies depend on public works, former service provider monopolies rely on regulatory bodies, and many other companies are directly related to the

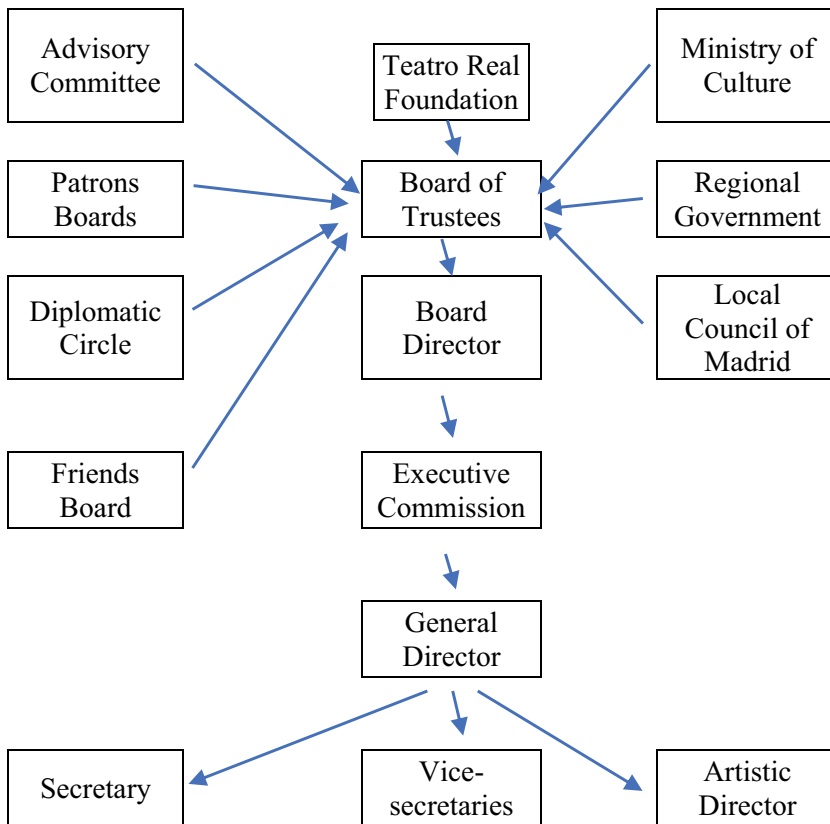


Figure 8. Governance organization chart for the Teatro Real (2018).

public sector. Given the above, we suggest that, although legally private, patronage is in fact closely related to the presence of the State, allowing sponsors from large companies to establish close relationships with senior governmental management and potentially making them privy to high-level decisions by government representatives (Figure 8).

Furthermore, the Board of Trustees also includes a significant number of high-level members of the aristocracy and royalty. For example, its President is the Marquis of Marañón, and its members include the Duke of Alba, a duchess, and three marquises. This indicates that these types of institutions continue to be very indebted to their elitist and legitimizing conception of State and monarchic power.

The Teatro Royal expenditure structure: structural constraints and continuities

A large part of the TR's expenses was for fixed items such as technical and administrative personnel, services, the orchestra and choir, and financial expenses, together accounting for 68.4% of its spending in 2008. The TR is the largest performing arts organization in Spain, with a staff of 338 in 2019; this figure reduced to 278 in 2013 at the height of the cuts and recovered slightly to 310 employees in 2017. However, despite the discourse on management efficiency, the structure of expenses and the importance of spending on staff meant that reorganization of its major expenditure items was still exceedingly difficult (Figure 9).

Although discourse about this opera focuses, in part, on its work to democratize culture and its pedagogical functions, in reality, its central activities still account for an overwhelming part of its expenditure. For example, in 2013, 72% of the TR's expenses were dedicated to opera productions and shows, and in 2017 this percentage had increased to 80%. In comparison, 1.5 million euros,

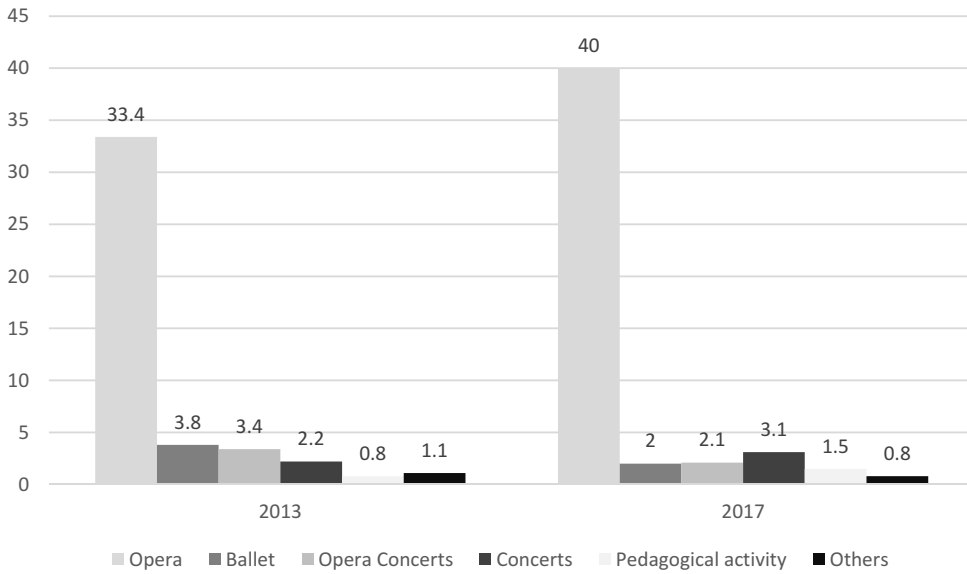


Figure 9. Expenses of the Teatro Real according to different lines of activity (2013–2017).

representing only 3% of its global budget, were spent on educational activities. Therefore, seen through this lens, rather than its 2019–2024 strategic objectives for the participation of young people in opera through technology as an effective, developed, and purposeful plan (Teatro Real 2019), they seem more like a pretext which characterizes and legitimizes it as a large cultural institution. Finally, since its reopening in 1997, the TR has become a source of successive crises and disputes between its managers and political leaders as an expression of the tension between its artistic, economic, and political-institutional arenas. One of the most significant of these, was the resignation of Juan Cambreleng as TR manager in 2001 over a dispute over the Ministry's attempt to limit his role to strictly financial functions and to take control of the TR through the figurehead of the Mayor of Madrid.

Other notable conflicts have since occurred, including the dismissal of the Musical Director, Jesús López Cobos, and the resignation of the Artistic director, Antonio Moral, in 2010. These reveal the presence of structural conflicts between areas of the organization itself in which artistic directors, striving for what they understand as artistic value and 'quality' (as defined by their field) were met with opposition both from the management and political spheres. Undoubtedly, the most significant crisis occurred in 2010 with the appointment of the prestigious director Gerard Mortier, former director of the Opéra National de Paris (2004–2009). This caused growing opposition among the TR's subscribers, especially the more traditionalist sector, the Amigos de la Opera, in relation to a drop in private funding. In reality, this decreased their income (including a reduction by more than 2 million euros for tickets and subscriptions) had coincided with the financial crisis and a more general decline in arts funding and spending on cultural expenses in Spain.

However, Mortier's artistic ambition had also led to a ten-fold multiplication of the deficit, culminating in a serious treasury problem that required intervention by the Ministry (Ministerio de Cultura 2016). His leadership was characterized by risky bets which sparked public distain, and his desire to take control of the TR from its CEO ended in his dismissal. Since then, the appointment of a high-ranking Director General from the State, alongside a director with lower artistic prestige and a more subdued international profile, have consolidated the institutional dimension of the TR, strengthening its corporate financing, projection as an international brand, and reputation as a meeting space for the capital's elite (Alvarez 2019).

Conclusions

There is no doubt that the main arts institutions and, in particular, the great opera houses form fundamental components of cultural policies. During the last 30 years they have grown in number and size but also now represent an increasing public finances cost. Moreover, their objectives have expanded into areas such as economic promotion, urban regeneration, and sociocultural revitalization. However, this greater importance has not been matched to the same extent with an increased understanding of the specificities and constraints of their management and governance (Towse 2001). Likewise, since the 1980s, cultural policies have been oriented towards instrumental objectives, causing cultural institutions to further develop new local, urban, or social development programs (Gray 2008).

As a result, within the framework of the New Public Management, governments and their cultural agencies have conceived new tools to protect and evaluate these public-value outcomes. Thus, the great opera houses, which co-opt large amounts of public resources, have elaborated new programs and discourses on integration and social participation (Rius-Ulldemolins and Rubio 2013). However, as we have seen, this is more discursive than real, and attempts at true reform and the implementation of new governance strategies have been largely frustrated by the inertia of opera house management, which continues to strongly focus on the production of lyrical shows as a kind of cultural policy. Furthermore, they also continue to maintain high ticket prices despite the very large percentage of their funding derived from public subsidies (Figure 10).

Nevertheless, this does not mean that management of the operas has remained unchanged since the 1990s and the emergence of the NPM. In Spain, we have seen an increase in revenue from patronage in the main State institutions in Madrid and Barcelona since the global crisis. If we analyze these investments by sectors, both the GTL and the TR concentrate more resources from territorial-level sponsorship and patronage than other Spanish opera theaters such as the Palau de les Arts Reina Sofia de València or the Teatro de la Maestranza de Sevilla. Moreover, there was an upward trend in the income of both the TR and GTL from 2009 to 2018, although there were also profound differences in the terms of these increases: the TR patronage revenue almost tripled from 2010 to reach close to 30% in 2018, while the GTL evolution in sponsorship and patronage revenues was much more tempered (Figure 11).

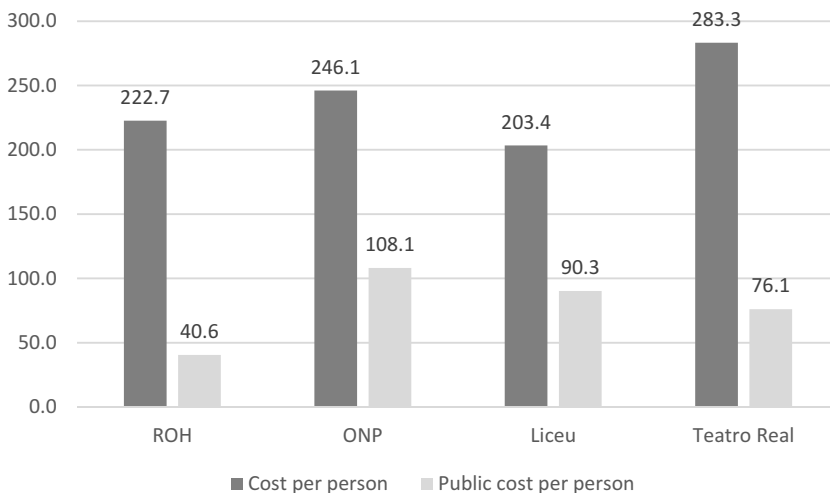


Figure 10. Cost per person versus public cost per person of the Royal Opera House in London, Opéra National de Paris, Gran Teatro del Liceu de Barcelona, and the Teatro Real de Madrid (2018).*

However, a supposed lesser dependence on the State or better-balanced funds does not necessarily entail greater management autonomy, as the theory of the independence of resources suggests (Sherer, Suddaby, and Rozsa De Coquet 2019). In these cases, the problem is that some financing sources are very interrelated. For example, in the configuration of States inheriting absolutist governance, large institutions, high-level civil servants, and business and social elites (encompassing both old elites with an aristocratic ancestry as well as new businesspeople) are all closely interrelated by their dependence upon the State to reproduce their social positions. Likewise, these large institutions then become spaces for interaction rituals that generate emotional energy and facilitate group bonding which carry forward symbols such as local identity or the monarchy, which in turn, synthesize the ideas of the regime.

In addition, recent developments have shown a decline in the role of the charismatic power that art directors have traditionally played within large performing arts organizations (Mangset, Kleppe, and Sigrid 2012). This seems to have been replaced with a commitment to more gray and technocratic directions at the service of plutocratic and technocratic representatives. Legally, they continue to be public cultural facilities: the buildings are public and continue to receive large amounts of public funds, but their dynamics and control are increasingly steered by a combination of business elites, high-level officials, and representatives of cultural and social elites (some of whom are recruited from illustrious and aristocratic families). Finally, this process has been carried out with the acquiescence – or in any case without the opposition of – the representatives of these institutions. These would traditionally include left-wing or populist parties, who have now accepted the framework and logic of austerity, cuts, and elitization of cultural policy in the absence of alternatives (Rius-Ulldemolins and Gisbert 2018).

In both cases, the correlation between an increasingly diversified Board of Trustees (including members from different councils with varied backgrounds and representatives of different social subsystems such as cultural managers, artists, intellectuals, critics, and experts), has increased funding through patronage. This provides evidence for the case of opera houses related to the academic literature analysis of the relationship between the composition of trustee boards and organizational performance. Notwithstanding, this analysis could be more exhaustive if individual profiles were examined, as was the case for Italy (Paola and Monti 2018). Considering that the period we reviewed in this current work saw a significant drop in public funding as a result of austerity cuts, the growing presence of business, artistic, and social elites in these large cultural facilities seems to

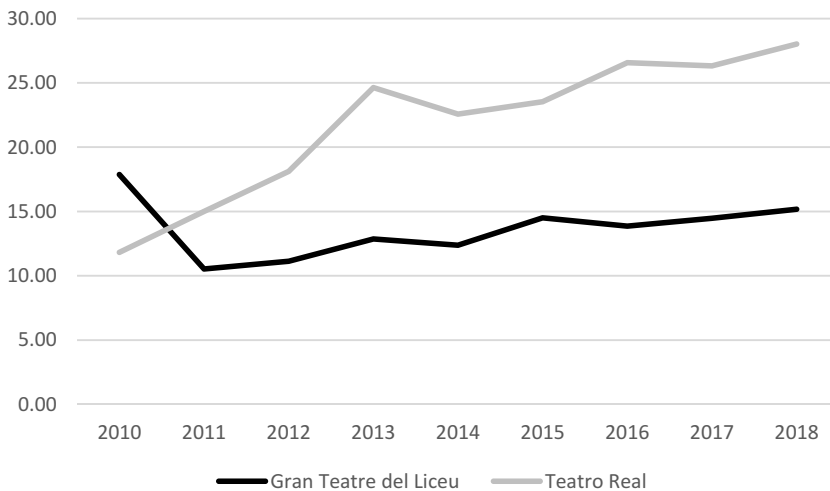


Figure 11. Evolution of the income from sponsorship and patronage of the Gran Teatre Liceu and the Teatro Real from 2010 to 2018.*.

have positively impacted their generation of patronage resources. Therefore, it appears that the hypothesis we outlined in the introduction to this work was confirmed in the sense that the search by cultural facilities for financial resources by increasing the presence of elites that can provide such sponsorship, has served to alleviate the global public financing crisis (and its consequences) these institutions experienced during austerity.

As a final note, we have omitted some aspects of the literature regarding opera theaters from our analyses here, instead deciding to focus on these aspects in more detail in future work. This includes the possible correlations between the composition of the Boards of Trustees (e.g. in terms of their comprising businesspeople and patrons) and the programming of more or less innovative and avant-garde artistic work (Paola and Monti 2018; Agid and Tarondeau 2007). In short, after the global crisis, an analysis of management and leadership either from the logic of a dual opposition between artistic and business goals (Chiapello 1998; Cray, Inglis, and Freeman 2007) or from the management logic as a synthesis or creator of public value (Kuesters 2010; Järvinen, Ansio, and Houni 2015), seems incomplete for large cultural facilities, especially for opera houses.

Notes

1. Our initial work plan envisaged the completion of interviews with various political and artistic leaders in 2020 – a plan which, evidently, was frustrated by the COVID-19 pandemic. Thus, we based our analysis on the study and triangulation of the following different sources, (a) memoranda of activities; (b) budgets; and (c) analysis of news about the evolution of these cultural institutions published during the study period (2009–2018) which encompassed the period after the 2008 crisis and the transformations resulting from this crash.
2. At the end of the 1990s Mark Shuster published the paper ‘Neither Public nor Private: The Hybridization of Museums’, a cultural policy analysis which hypothesized the hybridization of American museums (Schuster, 1998). This trend can also be expanded to museums and cultural institutions in other countries in the present day. For example, in the case of Barcelona, it is no longer accurate to refer to two ideal types of museums or cultural institutions according to two different cultural policy models, rather, new forms of hybrid museums and cultural institutions have emerged (Rius-Ulldemolins 2016). However, if the dominant trend in Barcelona in the 1990s and 2000s was the incorporation of institutions such as the Palau de la Música de València or the GTL into the public sector, the current trend is the inverse: accentuation of the privatizing and elitizing dynamics of these institutions.

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