Journal of Modern Italian Studies
Publication details, including instructions for authors and subscription information:
http://www.tandfonline.com/loi/rmis20

Italians and music. Financescape, ideoscape and mediascape

Giordano Montecchi [a]
[a] Conservatorio di Musica di Parma,
Published online: 18 Feb 2007.

To cite this article: Giordano Montecchi (2006): Italians and music. Financescape, ideoscape and mediascape, Journal of Modern Italian Studies, 11:3, 303-341

To link to this article: http://dx.doi.org/10.1080/13545710600806763

Journal of Modern Italian Studies 11(3) 2006: 303 – 341

Italians and music. Financescape, ideoscape and mediascape

Giordano Montecchi
Conservatorio di Musica di Parma

Abstract

This article explores the reasons why Italian contemporary musical life is generally considered to be below the standards set by other European and overseas countries, a situation that is all the more striking when the contrast with Italy's glorious musical tradition in past centuries is born in mind. The failings of public institutions and the inadequacies of policies have often been blamed for this, but in fact the causes are more complex. Arjun Appadurai's terminology that is cited in the title and the subsections of the article that are organized around the themes of 'financescape', 'ideoscape' and 'mediascape' provide the opportunity to develop a better understanding of the complex factors playing a role in the Italian music scene. In terms of structure and organization that greatest problems lay in the production system of the Opera theatres, in the progressive fall in public funds for the performing arts and in a visibly shrinking music market. These factors have created a crisis, but they have deep roots in Italian culture, one symptom being the relatively small demand for music in Italy. These different factors have combined to create a situation of immobility and conservatism that in turn weighs heavily on both serious and pop music.

Keywords

Opera houses, musical life, publicly funded music, music teaching, audio markets.

Introduction

It is quite a challenge to analyze and interpret the complex relationship between Italians and music without stumbling into an underlying prejudice. Those in Italy who are actively involved in music – that is, musicians, scholars, entrepreneurs in the sector, music lovers – are all relatively consistent in describing a state of dissatisfaction and a substantial anomaly of the Italian situation in comparison with other milieux, especially elsewhere in Europe, as the cultural – and already to some extent structural – consequences of the progressive reinforcement of Europe as an economically and politically unified system become increasingly noticeable. There is an almost unanimous belief that Italian musical life of the present day suffers from a considerable handicap in comparison with other European nations and those on other continents, a

Journal of Modern Italian Studies
ISSN 1354-571X print/ISSN 1469-9583 online © 2006 Taylor & Francis
http://www.tandf.co.uk/journals DOI: 10.1080/13545710600806763

handicap that is all the more galling in comparison with the distinguished Italian musical tradition of past centuries.

This state of affairs is generally blamed on Italy's institutions – everything from the national government to local agencies, from the educational system to the tax administration – which are said to cripple the development of music as a social activity. Points of criticism range from the absence of a solid and effective basic musical education to the lack of needed public funding to support the production of operas and concerts – what funding there is regularly falls short of the levels needed to ensure high-quality production values and artistic standards.

To put the blame on cultural policy, however, identifies only a subset of a far more-complex set of issues. The fact that I made reference to the terminology coined by Arjun Appadurai[1] in the title (and corresponding subsections) of this article is linked to the complex network of factors at play here, factors that are intricately interlinked and, at the same time, both independent one of another and, even, contradictory. In any case, these factors are such that they make it problematic to analyze and understand, in cause-and-effect terms, both the specific features that mark Italian musical life and the dynamics that govern that life. The following study identifies – under the headings of financescape, mediascape, and ideoscape – three especially significant dimensions in an attempt (perhaps an overambitious attempt) to describe the panorama of music in Italy in its overall complex and breadth.

In concrete terms, in Italian cultural and musical life, cries of alarm, appeals for progress, and denunciations of problems concerning the state of Italian music and the dangers that menace it (genuine *cahiers de doléance* marked by almost panicky if not apocalyptical tones) are the order of the day. Just to offer an example, we will quote from the text of a recent petition distributed in July 2004 by the Centro Coordinamento Musica (Music Coordinating Center) for the Associazione Generale Italiana dello Spettacolo (AGIS, or General Italian Association for the Performing Arts) and signed by many representatives of philharmonic societies, orchestras, theaters, festivals, and opera foundations, to protest against the proposed cut in financing to the Fondo Unico per lo Spettacolo (FUS or Unified Fund for the Performing Arts), the funding body through which the Italian government supports the performing arts:

> We would like to express our dismay and intense concern at the prospect of yet another reduction in the FUS for 2004 and 2005; such a cut would lead to an irreversible crisis in the Italian musical system, which has already been badly weakened in recent years by decisions that ignored the needs of the sector.
>
> The entire musical sector ... will be overwhelmed by this legislative proposal, which fails even to consider that the array of economic activities created by the musical sector, and its vast induced activity, produce a flow of revenue to the state that is far greater than the product of the cuts that are being proposed.

> The Italian musical sector, the pride of our nation, runs the risk of being destroyed by these incomprehensible choices, which are not justified even by the country's precarious economic condition.
>
> Musical artists and professionals in the field would therefore like to ask the government and the ministers concerned with this area to review this matter expeditiously with a view to a more carefully thought-out consideration of the matter, in order to avoid the imposition of harsh decisions which would surely be regretted in the future.[2]

Documents of this sort are a recurring feature, and point to a widespread malaise within the musical sector which, rightly or wrongly, is believed to be singled out for damage by cultural policies that are thought to be inadequate and (the greatest source of concern!) chronically stingy with public funding.

Financescape

Leaving aside the recurring polemics, there are a number of statistical and economic indicators that reveal an objective gap between the Italian system of musical production and consumption and the average level found in other European countries. It is certainly significant, as we shall see, that the Italian recording industry market is so glaringly underdeveloped in comparison with other European countries. It is possible, moreover, to document statistically how much higher the cost of producing an opera is in Italy, or how much more expensive theater and concert tickets are there – in comparison with per capita incomes that, to the contrary, are certainly not among the highest in the European context.

We shall attempt to explore all these aspects, with the use of data gathered from various sources, but we should be aware that the collection of data and statistics on a Europe-wide scale is plagued by the almost insurmountable difficulties involved in establishing comparisons that employ homogeneous criteria. Such comparisons are not yet available in the field of culture and cultural policies.[3] The many studies and the projects intended to develop instruments and methodologies for a comparative analysis of the data concerning cultural production and consumption in Euro-zone countries are nowadays a singularly interesting field for research and planning.[4]

That the Italian musical milieu is currently undergoing a period of malaise is undeniable. The progressive erosion of public funding, the inequalities that result, and the traditional scarcity of economic support from private individuals are all factors in the development of the dueling claims from the various sectors of musical production which, as one might guess, generally translate primarily into economic special pleading and skirmishes to defend or expand the available percentages of financing. The mass media, the daily press, the succession of conferences, petitions, and statements of famous artists in 'defense' of this or that musical genre provide ample documentation of the state of affairs, with a special emphasis on the need to safeguard so fundamental a national

value as music and, in particular, opera, generally described as one of the foundations of Italy's cultural identity.

In effect, the powerful opera lobby is the one that most frequently complains about the threats to its existence from the gradual drop in public funding. In Italy, the opera establishment, currently consisting of fourteen opera and symphony foundations and twenty-four *teatri di tradizione*, the second tier of opera houses, is obliged on the one hand to negotiate the inherited burden of an exorbitantly costly system of production at the risk-fraught moment of transition from an entirely state-funded operation to the private status of the foundations, which were instituted in 1996.[5] On the other hand, the Italian opera system must face groundswells of public opinion that often call into question its economic privileges and its artistic and cultural role, from time to time calling for theaters to be shut down – decrying those theaters as money-wasting anachronisms or outmoded relics from a long-forgotten era, and so on.

This is an endemic controversy, so to speak, dating back centuries in Italian cultural history, and which occasionally breaks out in especially virulent episodes. One such episode was the historic pamphlet published by Fausto Torrefranca; another such episode came when the Italian author Sandro Veronesi, in an article that was published 14 years ago, triggered a furious debate that remains equally relevant today. Instead of the customary attacks on the system of opera (in keeping with the principle that opera is an unquestioned cultural heritage that is, however, hindered by an inadequate system of production), Veronesi ventured to state that 'the tradition of opera in our country [Italy] has become a harmful tradition, toxic, backward, and culturally mediocre', triggering a predictable chorus of reactions, in vigorous defense of opera as a cultural value (see Torrefranca 1912; Veronesi 1992).

The reactions of the opera world to the criticisms of various stripe that are aimed at it on a recurring basis have returned reliably to the key concepts of the venerable dignity of opera in the hierarchy of the arts and in the cultural history of our nation, Italy, as well as the absolute excellence of Italy's opera houses, La Scala first and foremost. These considerations alone are then said to justify the admittedly elevated costs.

One excellent example of this stance can be found in the words of Carlo Fontana who, at the time that he wrote them, was the chairman of the *Associazione Nazionale Enti Lirici e Sinfonici* (National Association of Autonomous Opera and Symphonic Houses). The following words date from the early 1990s, and took the form of an Introduction of the *Libro bianco sulla gestione degli Enti Lirici* (*White Book on the Management of Autonomous Opera Houses*), which has sadly remained an isolated effort in the publishing panorama:

> We believe that we can claim, without fear of contradiction, that in this field our country can still hold its head high. Italy is unrivalled in Europe in terms of the average quality of productions of opera and ballet . . . ; in terms of the quality of our singers and our conductors, in absolute terms, a world

> leader; for the widely acknowledged professional skills and creativity of Italy's directors and stage designers.[6]

Echoing this statement, with its emphatic claims that are impossible to prove or disprove, Cesare Romiti sang in chorus, setting forth the other bridgehead of Italy's opera-sector ideology:

> Opera is a heritage that belongs to our cultural history and, in the international community, it is considered to be a distinctly Italian artistic creation. For years, however, opera houses have been forced to battle against economic hardships that have at times threatened their very existence .... Hence the need for state funding and other special proceeds.[7]

Written in 1990, these declarations strongly emphasized the theme of quality. In terms of production – and therefore in quantitative terms – a few figures on the activity of a number of Italian and non-Italian opera houses in that same year clearly point to one peculiarity of the Italian situation that in the years which followed showed no detectable indications of change. In fact, in the leading Italian opera houses (Table 1[8]), the cost of a production is twice or three times the cost in other major European opera houses, while the number of performances per season is three or four times lower.

The only datum (cost per performance) that is comparable with the two leading Italian opera houses is that of the Metropolitan, though the Met stages a much higher number of performances per year. Also, the Met's high production costs are supported heavily by private contributions and corporate sponsorships, so that they are not borne directly by society as a whole, in contrast with the practice in Italy and all European countries, where opera houses rely upon massive public funding.

There is no up-to-date documentary study in Italy that provides an in-depth analysis of the causes for such high production costs in Italy's opera sector.

Table 1 Number of performances and cost per performance of several major Italian and non-Italian opera houses

Opera House	*Number of performances per season*	*Cost per performance (Italian Lire, millions)*
Milan (La Scala)	81	602
Rome (Opera di Roma)	68	400
New York (Metropolitan)	232	500
Paris (Opéra)	126	315
Vienna (Staatsoper)	253	316
Munich (Nationaltheater)	223	223
Berlin (Staatsoper)	209	215
London (Covent Garden)	135	175

There are no publications, for example, that provide information about one of the reasons for this sharp rise in costs, and specifically the fees paid to singers, actors, and their agents. In this specific area, in fact, there is a generalized reluctance to provide information on the part of the professionals in the field, and the specialty press is also very cautious about dealing with the topic. Those fees are usually described as being far higher than the European average (in part because of the especially burdensome tax treatment), but even now this remains a territory for vague conjecture because of the strict secrecy that the *Enti Lirici* (Autonomous Opera Houses) maintain on this point.[9] Another factor that makes Italian opera production especially costly is the high number of employees hired on open-ended contracts, which leads to cost increases for the staff, a low level of per capita productivity, as well as an especially high level of stagnation in management terms.[10]

The two tables that follow (Tables 2 and 3) offer for comparison a number of statistics regarding Italian *Enti Lirici* taken as a group, with comparable statistics for a number of European opera houses. The comparison points out considerable differences between Italy and the rest of Europe in terms of opera management. We may note the relationships between income and outlay, the percentage provided by public funding, the proportion spent on personnel, box office performance, as well as a number of statistics concerning production and productivity.

As for the *Enti Lirici*, a comparison of three years selected from a decade-long span of time (1990 – 1993 – 2000), shows a trend toward containment of spending on full-time staff and for the performing artists, with an overall reduction of spending of about 9 per cent.

Corresponding to that is a reduction of public funding, which at the beginning of the 1990s corresponded to a little less than the overall spending on staff, while in 2000, despite the efforts made to reduce spending, the figure for public funding was much less than the amount spent on staff. From 1990 to 2000, public funding as a percentage of total revenue, in fact, dropped by 12.5 per cent, from 78.4 per cent to 65.9 per cent.

The four European opera houses examined in Table 3 differ sharply. In Berlin, the Deutsche Oper appears to be heavily subsidized, with very high personnel costs, even higher than the Italian average, and with limited box office sales that, in the year under consideration, led to a net loss of about DM 2.6 million. Far different is the picture for the British National Opera and the Opéra of Paris, where staff costs are far lower, as are public subsidies, though that funding still fully covers salaries. We should emphasize the fact that both these opera houses operate in the black. The Finnish Opera is yet another case, occupying an intermediate position, comparable in a sense – if we ignore the fact that box office sales are higher – with Italian opera houses. In fact, the Finnish Opera appears to have had a very difficult time financially throughout the 1990s (Auvinen 2000: 112).

Despite the many claims by the opera and musical establishment in Italy to the contrary – and it is not hard to understand why they would make those

Table 2 Enti Lirici, or autonomous opera houses: public funding, box office revenue, personnel costs, tickets sold, and the respective impact on total outlay and revenue in the years 1990, 1993, and 2000*

	1990		*1993*		*2000*	
Aggregated data for the 13 Enti Lirici	Lire (millions)	%	Lire (millions)	%	Euros (millions) [Lire (millions)]	%
Total revenue (average per opera house)	616,350 (47,412)	100.0	712,468 (54,805)	100.0	508.8 [985,174] (39.1)	100.0
Public funding (national + local government)	483,182	**78.4**	545,165	**76.5**	334.8 [648,263]	**65.9**
Box office revenue	73,020	11.8 [8.8]†	105,537	14.8 [11.7]†	84.2 [163,034]	16.5 [13.2]†
Total outlay (average per opera house)	629,601 (48,430)	100.0	694,551 (53,427)	100.0	514.7 [996,598] (39.6)	100.0
Spending on full-time employees	397,252	63.1	415,650	59.8	283.5 [548,950]	55.1
Spending, artist's performance fees	116,038	18.4	133,456	19.2	88.8 [171,950]	17.3
Total spending on personnel	513,291	**81.5**	549,106	**79.0**	372.3 [720,900]	**72.4**
Full-time employees (average)	5835 (449)		5174 (398)		5455 (420)	
Visiting artists	n.a.		n.a.		n.a.	
Number of performances (average)	1246 (96)		1254 (96)		n.a.‡	
Average capacity†	1487†		1487†		1487†	
Tickets sold annually	n.a.		n.a.		1,758,598† tickets	
Index of productivity (tickets/personnel)	n.a.		n.a.		357†	

*Based upon data taken from the following sources: Ruggeri and Lunghi (1996); Leon (2004).
†Leaving aside the Arena of Verona.
‡The data given in Leon (2004) (see note 10) cannot be used, because it includes concerts as well.

Table 3 Public funding, box office revenues, personnel spending, tickets sold, and respective impact on total outlay and revenues of four European opera houses in the years 1997–1998*

	Deutsche Oper Berlin 1998 (DM)	*English National Opera – London* 1997–98 (GBP)	*Opéra National de Paris*[a] 1998 (FF)	*Finnish National Opera – Helsinki* 1997 (FIM)
Total income local currency [Italian Lire, billions]	100,025,000 [98.7]	26,680,000 [76.7]	874,900,000 [257.6]	204,324,000 [67.0]
State and local subsidies	80.2%	60%	65%	67%
Box office	9.5%	26%	25%	20%
Total spending local currency [Italian Lire, billions]	102,590,000 [101.3]	23,723,000 [68.2]	866,100,000 [255.0]	204,324,000 [67.0]
Personnel outlay	72.3%	59%[b]	57%	80%[b]
Visiting artists outlay	12.2%	[included above]	n.a.[c]	[included above]
Personnel	847	570	1388	583
Visiting artists	108	92	300	172
Number of performances	195	193	366	199
Capacity (seats)	1900	2350	1875 + 2700[a]	1365
Tickets sold	265,946[d]	342,335	814,782	273,899
Index of productivity (tickets/ personnel)	306.7[d]	600.6	587.0	469.8

**Source*: Auvinen (2000) – based on data. In this table, as in Table 6, for the years prior to the introduction of the Euro, with a view to making it easier to compare data, the European currencies have been converted into Italian Lire on the basis of the historic series (annual averages) supplied by the Ufficio Italiano Cambi, or Italian Exchange Bureau [http://www.uic.it/UICFEWebroot/].
[a]L'Opéra encompasses two separate theatrical complexes: Palais Garnier and Opéra Bastille.
[b]Including outlay for visiting artists.
[c]The opera house lists outlays for performing artists (without specifying the amount) under the heading 'artistic productions', which is equal to 23 per cent to the total outlay.
[d]Datum for 1995–96 (in that year, the theater had 867 employees).

claims – public funding of opera houses in Italy is certainly no lower than in the rest of Europe, and is actually quite substantial, amounting to a very respectable share of the total revenue. The most substantial difference between the Italian system and the European context, at least according to this small but highly representative sampling, has to do largely with box office performance. With the exception of the Deutsche Oper, which is mostly funded by the Berlin Land government, the other three opera houses examined here have box office

revenues that hover between 20 and 26 per cent of total revenues. In Italy, this percentage, although it is enjoying a slow overall rise, is historically at a much lower level, and in 2000 it reached 16.5 per cent. This share, however, drops sharply if we take the Arena of Verona out of the mix. The arena, with its 16,600 seats, is an entirely exceptional case, not only in Italy, but also in Europe and worldwide. If we leave out the Arena, then box office revenues for 2000 are limited to an average of 13.2 per cent of total revenues, that is, about half of what is found in many European opera houses (this is also due to the difference in annual number of performances, a ratio of about 1:2).

The crucial question, to which no one in Italy has yet been able to provide a convincing answer, would seem to be then how to increase box office revenue while reducing production costs to levels comparable with the rest of Europe.

A confirmation of Italy's poor performance in terms of revenue from musical activities, both classical (concerts, opera, ballet) and popular is provided by the statistics furnished by the European Music Office for the year 1994–1995 (Table 4). The statistics are not uniform and they remain incomplete (so they should be treated as very provisional), but they are indicative of the difficulties described previously in making comparisons on a European scale.

Table 4 Concerts and other live performances (classical and popular) 1994–95*

Country	*Events (concerts, opera, ballet)*		*Audiences [in millions]*	*Revenues [millions of ECU][a]*	*Total revenues (classical + popular) [millions of ECU][a]*
Austria	classical	5,629	4.3	n.a.	n.a.
	popular	*n.a.*	*n.a.*	*n.a.*	
France	classical	1,300[b]	1.1[b]	n.a.	233.0[b]
	popular	*20,000*	*8.0*	*233.0*	
Germany	classical	19,100	12.2	370.0	815.0
	popular	*n.a.*	*n.a.*	*445.0*	
Italy	classical	20,000[c]	4.9	54.3	118.6
	popular	*16,600*	*5.8*	*64.3*	
Netherlands	classical	8,440	4.5	n.a.	n.a.
	popular	*10,750*	*6.1*	*n.a.*	
Spain	classical	4,772	5.6	20.0	80.0
	popular	*13,100*	*n.a.*	*60.0*	
United Kingdom	classical	2,200[b]	13.0	n.a.	305.0[b]
	popular	*n.a.*	*n.a.*	*305.0*	

*Based on data from Laing and Rutten (1996).
[a]1 ECU = 1 €.
[b]Incomplete datum.
[c]According to the authors' society SIAE, classical music accounted for over 40 per cent of all ticket sales for concerts of popular and classical music. This relatively high figure for classical music may be due to the exclusion of smaller events in clubs or dance halls from the popular music category [EMO].

Italy's spectacular lead in terms of the number of concerts is certainly due to the incomplete numbers from other countries, and yet the fact that so high a number of concerts should yield such unimpressive revenues – aside from the issue of whether the statistics are entirely reliable – is an eloquent indicator of the overall fragility of the system.

This is an overall economic picture that we can describe in general terms based on the available data, but the underlying mechanisms and dynamics still pose many questions. Of course, there are many other factors in play. One such factor is the cost of admission in opera houses, long a source of debate in Italy, between those who consider those prices absurdly high and those who disagree, pointing out that they are in line with the rest of Europe, and justifying in some cases certain high prices with the fact that Italy is unique, because it is the repository of the most distinguished operatic tradition on earth.

The intricate variations in price ranges, the special rates afforded certain theater-goers, the different capacity and type of halls – all these factors make it difficult to venture any pan-European comparisons. Figure 1 ventures a comparison based on data gathered empirically, and referring to a top-price seat (a category that is found in all the theaters examined), and displaying the range between highest price (for opening-night performances) and lowest prices (cheaper performances, matinées, etc.). It is clear from the diagram that the prices of the twelve Italian opera houses are on average noticeably higher than the prices found in the twelve European opera houses.[11] Only in a couple of cases (the Gran Liceu, and the Vienna Staatsoper) were comparable or even higher prices found.[12]

A noticeable rise in prices has affected the entire musical sector in Italy, not just the opera sector. Table 5 provides a comparison between four major European musical venues, comparable one with another in terms of multi-hall structure and in terms of programming, which encompasses a vast array of musical genres: Cité de la Musique (Paris), Barbican Center (London), South Bank Center (London), and Auditorium Parco della Musica (Rome). As the reader can see, here too we find higher-than-average prices in Italy, and on certain occasions (for instance, a tour by Keith Jarrett), those prices skyrocket in an unsettling manner.

High or very high production costs, high admission fees, low numbers of performances, low box office revenue – this is the lockgrip in which Italian opera houses are forced to operate. The inescapable need to fund their operation triggers an inequitable mechanism, with negative repercussions on the entire music sector. This is the situation that generates the recurring cries of alarm and demands for financing, financing that – even if we leave aside the fact that it has actually been shrinking over the past two decades – is still chronically inadequate. In Italy, public funding for culture is generally split between about 50 per cent[13] administered by the national government and another 50 per cent funded by various level of territorial government (regions, provinces, townships). In absolute terms, Italy cannot compete in cultural spending with

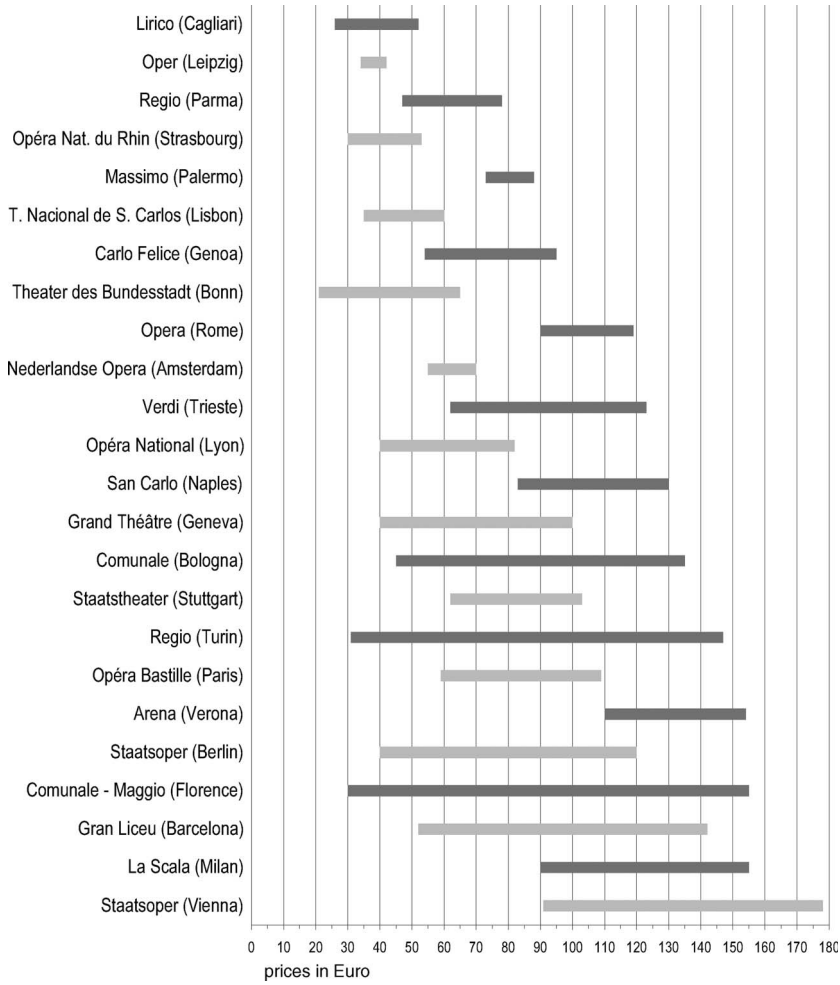

Figure 1 Highest (inaugural performances) and lowest prices (matinées, etc.) for 'top price' seating in 12 Italian opera houses and 12 European opera houses for the 2002–2003 season.

countries like France or Germany, and yet the effort expended by the national government and local agencies to support culture and the arts is anything but negligible. Aside from absolute numbers, there are also historical and environmental factors that inevitably lead to differences in the allotment of funding and priorities in the cultural policies of various countries. In Italy, as in other countries, cultural appropriations must necessarily take into account the country's vast patrimony of monuments, museums, and documents, a heritage that absorbs the preponderance of public financing.

Table 5 Highest and lowest ticket prices (full price, special discounts excluded) at four concert venues in May 2003

Prices in £ [GBP]	*Cité de la musique Paris*	*Barbican Center London*	*South Bank Center London*	*Parco della musica Rome*
Highest prices	34.0	50.57 [35.0]	50.57 [35.0]	51.92
Lowest prices	7.0	9.39 [6.5]	8.67 [6.0]	11.90
Keith Jarrett solo			max 72.25 [50.0]	max 129.80
			min 28.90 [20.0]	min 64.90
			(May 3, 2003)	(May 5, 2003)

The numbers in Table 6 are a fairly heterogeneous collage of data from various sources[14] and concerning public cultural funding between 1990 and 2002, providing comparisons of Italy with France, Germany, and Spain.

The amounts are always the total of all central government funding added to the funding provided by the various local governments. Although there are many evident gaps, the table does point out a number of significant aspects. At the beginning of the 1990s, cultural funding in France and Germany was at least twice or three times the corresponding amount of funding in Italy. With the passage of time, however, that difference shrank, in part because of an increase in Italian funding (which nearly doubled between 1995 and 2000), and in part because of Germany's well-known economic difficulties during those years, which forced the country to cut its cultural spending sharply.[15] In the absence of recent data for France, according to the data of Cultural Policies in Europe, in the year 2000 Italy allocated cultural funding that puts it somewhere between Spain's corresponding allocations in 1999 and those of Germany in 2002. One statistic that distinguishes Italy sharply from France and Germany is the much lower percentage of resources set aside for the performing arts.

According to these data, the widespread opinion that Italy 'spends very little' on culture would seem to be accurate only in part. Although it remains impossible to draw up completely reliable indices on a European scale, per capita public funding in Italy for the year 2000 would appear to be greater than the average for Germany in the period 1995–2002 and slightly lower than in Spain – where it is well known that an enormous push has been made in recent years in the cultural sector. All the same – just to reiterate the difficulties, mentioned above, in making comparisons between different countries – if we draw on other sources, such as the report of the Working Group on Cultural Statistics of the European Commission (see Table 7), we clearly see the large gap that continues to exist between Italy and other European countries in the area of cultural spending (see Task Force on Cultural Expenditure and Finance 2001).

Table 6 Spending trends for culture between 1990 and 2002 in four European countries. The values are in local currencies (the corresponding values in billion of Italian Lire are shown in square brackets)

	1990	*1993*	*1994*	*1995*	*1996*	*1997*	*1999*	*2000*	*2002*
Italy									
total expenditure	5,972 billion Lire			6,778 billion Lire				6.7 billion € [13,062]	
per capita expenditure								118 €	
performing arts								0.66 billion €	
(% total)								(9.8%)	
France									
total expenditure		61.0 billion FF [16,927]			70.9 billion FF [21,400]				
per capita expenditure					189 €				
performing arts		16.5 billion FF							
(% total)		(27%)			(24.1%)				
Germany									
total expenditure		17.2 billion DM [16,371]		15.0 billion DM [14,812]				7.95 billion € [15,393]	8.27 billion € [16,013]
per capita expenditure				93.57 €					100.36 €
performing arts		6,644 billion DM							
(% total)		(38.6%)		(44.6%)				(44.4%)	
Spain									
total expenditure			422.6 billion ESP [5,091]			752.3 billion ESP [8,750]	860.7 billion ESP [10,050]		
per capita expenditure						113.73 €	128.62 €		

Table 7 Public spending on culture in four European countries

	Austria (1999)	*France (1996)*	*Germany (1998)*	*Italy (1999)*
Total Gross Public Cultural Expenditure (millions €)	1,445.7	10,501.6	9,778.7	5,740
Per Capita Expenditure for Culture (€)	179	180	119.2	99.7
Percentage of Cultural Expenditure on GDP*	0.8%	0.9%	0.5%	0.5%

*Gross Domestic Product.

We reach a comparable conclusion if we extend the horizon to include many countries in the European community (see Table 8) with reference to such indicators as per capita cultural spending and the percentage ratio between cultural funding and GDP (gross domestic product).

Aside from the overall findings and the relative discrepancies, there is clearly a convergence of data that puts Italy toward the bottom in a ranking of the leading European nations. Where music is concerned in more specific terms, the Italian situation is especially grim because, as we have already seen, the funding available for the performing arts represents a sharply lower share than that seen in countries such as Germany or Austria, where music and theater are the largest category of cultural funding, or like France (and many other European countries) where in any case the funding for the performing arts is far more substantial than in Italy (see Council of Europe–ERICarts 2002; European Commission and Ministries of Culture of Spain and France 1997; Task Force on Cultural Expenditure and Finance 2001). In Italy, the largest share of cultural funding (about 50 per cent) is allocated to the preservation of the cultural patrimony (monuments, museums, libraries, archives, and so on), while funding for the performing arts tends to hover at levels ranging between 10 and 15 per cent.[16]

The progressive reduction of public funding for culture and the arts is a phenomenon that has affected many European countries in recent years. In Italy, the progressive shrinking of public subsidies in real terms has been especially acutely felt in the performing arts sector, contributing to a spreading sense of malaise not only among the *Enti Lirici*, but throughout the larger field of music. The process of transformation of *Enti Lirici* into foundations (that is, into institutions that are less and less dependent upon public funding and increasingly capable of relying upon an efficient activity of fund raising), a process that was set in motion many years ago but which is not yet complete, has proven to be particularly challenging and has done little if anything to offset the effects of the constant erosion of the chief source of public financing, the Fondo Unico per lo Spettacolo (FUS, Unified Fund for the Performing Arts), a

Table 8 Public cultural spending per capita and as a percentage of GDP in 15 European countries

	Austria (2000)	*Belgium (1999)*	*Bulgaria (2002)*	*Estonia (2002)*	*Finland (2000)*	*France (1996)*	*Germany (2002)*	*Greece (2001)*	*Hungary (2004)*	***Italy (1999)***	*Netherlands (1999)*	*Portugal (1999)*	*Slovenia (2002)*	*Spain (1999)*	*Sweden (2000)*
Per capita expenditure for culture (€)	225	245	13.9	90	175	189	100	37.9	35.7	**118**	128	n.a.	92	128	195
Percent of cultural expenditure on GDP*	n.a.	n.a.	0.75	1.9	0.75	0.9	n.a.	0.32	0.5	**0.5**	n.a.	1.2	0.82	1.0	1.1

Source: Council of Europe – ERICarts (2002).

state fund that each year is divided up among the various sectors of the performing arts (music, film, theater, dance, circus, and so on) according to preestablished shares.[17] The main recipients of this funding are, in fact, the thirteen *Enti Lirici*[18] which alone absorb just under half of the total.

From 1985 (the year it was established) to 2004, the allocation for the FUS rose from 704 billion Italian Lire (nominal value of €363.6 million) to the current €500 million. At the time, the establishment of the Fondo Unico, or Single Fund, represented a considerable increase in state funding for the performing arts. In 1984, state funding for the performing arts amounted to 403 billion Italian Lire, and so the 704 billion Lire of 1985 represented an increase of about 75 per cent (see Trezzini and Curtolo 1987: 166). Still, over the course of nearly 20 years, although there was a nominal increase of 27.2 per cent, the real value of the FUS – if we take into account the rate of inflation over that period, which amounts to some 50 per cent – has actually declined by 32.6 per cent.[19]

The intent of the lawmakers was that this progressive reduction of state funding, in conjunction with the progressive and carefully administered transformation of the *Enti Lirici* into foundations, would be balanced by an increase in private giving. That was the objective of a legislative measure issued in 2000, which introduced the long awaited tax deduction for 'liberal payouts', i.e. donations to the sectors of culture and the performing arts.[20] In a country like Italy, which has always been fairly retrograde in legal terms in the area of private giving, there was keen interest in how private donors might react, and how much giving would ensue. A full 6 months after the law went fully into effect, however, according to a statement made in March 2002 by Giuliano Urbani, the Minister of Culture (the full title is Minister for the Artistic Heritage and Cultural Activities), the picture was anything but rosy. Compared with a maximum level of €139 million set on a precautionary basis by the ministry, the donations in the sector of entertainment and culture were much lower: in 2001 the donations amounted to €17 million, of which 62 per cent – about €10 million – were intended for entertainment. In 2002, according to statistics made public by the Ministry of Culture, the donations dropped to just under €14 million, while in 2003 the donations climbed back up to about €17 million.[21] This is a tiny sum, 647 times smaller than the corresponding figure recorded for the year 2003 in the USA. In the USA, according to the annual report of the American Association of Fundraising Counsel (AAFRC), donations from private donors to the sector of the 'Arts, Culture and Humanities' reached a level of US$13.11 billion, roughly equivalent to €11 billion.[22]

Ideoscape

Although the 'opera factor' is far more important in the panorama of public funding than is entertainment, the Italian musical field is certainly not limited to opera, nor are the problems or even the policies limited to purely economic

questions. The Italian financescape of music that we have described is the product of processes and dynamics that are clearly not limited only to economic and cyclical in nature, but are instead the result of processes that date back much further in time, regarded longer periods, and are bound up with the peninsula's social and cultural history. To summarize matters to an extreme degree, we might say that from the eighteenth century on, Italian music – with the exception of opera – has done nothing but lose ground in the ranking of humanistic disciplines and fine arts. In modern times, the Italian cultural world has witnessed a progressive general demotion of scientific and technological pursuits, downgraded to the level of second-class culture, with respect to a first-class cultural category consisting of the liberal arts, especially the literary field (see De Mauro 2004). This identification of high culture as theoretical knowledge, with a corresponding downgrading of 'know-how', and therefore of practical abilities, was certainly not unconnected to two distinctive traits of modern Italian history: in the first place, the deep-rooted religious and anthropological conception of Counter Reformation Catholicism on the one hand and, on the other hand, the failure to develop in the eighteenth and nineteenth centuries of a middle class capable of playing a role and exerting an influence comparable to that of the middle classes in countries to the north of the Alps. Italy's failure to develop middle-class habits and life styles meant that there was no diffusion of amateur musical activity, a circumstance that paved the way for the progressive marginalization of music from the ranking of fundamental educational values, to the point that it almost vanished or in some cases vanished entirely from the teaching curriculum in primary and secondary schools in unified Italy. In modern Italy, for ordinary citizens and for educated people, music was nothing more than a sublime art to be revered. Music as a practical activity was instead reserved for a class of professional musicians, who learned musical techniques in special schools that had preserved for many centuries the name of *Conservatorio*, or conservatory, from the name of those pious institutes that took in abandoned children and orphans in Venice and Naples, fed them, taught them the catechism, and then set them to prepare for the professions of musician or singer.

This dichotomy persists and is still strongly rooted in present-day Italy, where a poorly educated class of musicians[23] has fairly little in common with an intellectual class and a citizenry that are, in turn, generally musically illiterate. From the seventeenth century on, this sociocultural panorama (dominated by an aristocratic separation between intellectual culture and technical and practical culture that has hurt music in a particular manner) has also been the background against which over the past centuries, Italian opera has reinforced its standing and has prospered as the emblem of a national culture that has been strongly marked by traditional features (Montecchi 2002) and, even after the attainment of Italian national unity in 1861, has been marked by the survival of pre-bourgeois cultural and ideological traits, which date back to the time of the *Ancien Régime* (Mayer 1981).

When the Teatro La Fenice, in Venice, was destroyed by fire on the evening of 29 January 1996, the first overwrought reactions of the authorities as they arrived on the site of the disaster were an emphatic declaration of intent: to rebuild the opera house immediately, 'right where it used to be, and the same as it used to be'. The phrase 'right where it used to be, and the same as it used to be' became the slogan of a powerful groundswell of emotion that received the wholehearted support of nearly all the celebrities of the world of opera and the popular media, exhaustively interviewed in the days that followed the disaster. The objections raised by many architects and a few intellectuals were largely ignored. They pointed out, to generally deaf ears, that emphasizing the 'same as before' approach would amount to closing one's eyes to the present, recreating a fake original, and transforming into a fetish a structure that had been the result of a series of renovations carried out in various periods.

What prevailed over the deeper-rooted arguments was a mixture of nostalgic sentimentalism and fetishism on the part of many artists and public figures who were convinced supporters of the view that it was wrong to try to deprive the city of Venice, opera lovers in general, and the entire world of one of the most glorious operatic temples of all time. When we reread the many statements made, what is especially striking is the overwhelming devotion to an idea of restoration dictated, more than by any questionable sense of philological attachment, by the sense of a need to restore a *habitus*, a social practice perceived as an unquestionable and unchanging value.

When someone asked him how he wanted the new La Fenice to be, Riccardo Muti answered: 'Exactly the way it was. I hope that will be possible. It must be possible. It was possible in the past, when the theater was destroyed once before [in 1836, editor's note], and now it should be rebuilt in just the same way. A different opera hall is unthinkable' (Bandettini 1996). He went on: 'It was a catastrophe that he had trouble in believing had happened, like suddenly losing something that one had always considered to be immortal' (Pasqualetto 1996). When someone interviewed Luciano Pavarotti, he stated: 'This theater was our jewel, it was the finest theater in Italy. So warm and welcoming. It was like being at home' (Anon 1996).

If an intellectual like Massimo Cacciari, at the time the mayor of Venice, emphasized the need to preserve the cultural and emotional value of the *monumentum*, most of those who spoke out seemed to care most about the worth of the place as an unrivaled setting and ornament, which the city and nation could not do without.

The chorus of 'where it used to be, and just like it used to be' was more than just an example of the 'fetishizing opera-house' that Jeremy Tambling has talked about (Tambling 1994: 8); it was also and especially tantamount to an attempt to eliminate history, to halt the passage of time. It was, that is, a clearly traditionalistic choice, evidently aimed at preserving in an acritical fashion the heritage of tradition understood as a treasure chest packed with deathless, meta-historical values, to be preserved unaltered at any and all costs. In that

instinctive reaction of 'where it used to be, and just like it used to be', we see an expression of what Carl Dahlhaus would have described as 'naïve traditionalism', marked by a situation in which 'convention and validity merged into an undifferentiated whole', as well as a 'mute submission to the authority of all that used to be'. Something more than a conservative mindset (which compares the past with the present and generally prefers the past); rather, the unreflecting reaction of 'those who feel guided and sheltered by standards, institutions and habitual patterns of perception from previous centuries will likewise feel a sense of confidence in the present and, at the same time, foresee a future that differs little from the present' (Dahlhaus 1983: 66–7).

Dahlhaus's definition of traditionalism perfectly describes the mindset of the class that in Italy decides the fate of opera (and to a considerable extent, the fate of music in general), a class that generally presents itself as the defender of a cultural heritage considered as an inviolable canon. Both the performers and the audience, especially in the realm of opera, remain attached to an idea of literal-minded orthodoxy that relies upon a philologically rigorous and fairly timid conception of the text, both in terms of the philology of the actual execution,[24] and in terms of rereadings and interpretations that are too openly metaphorical or in search of greater modern-day relevance, often summarily condemned as betrayals of the 'truth' of the text. This ideological background finds confirmation in the concrete reality of the Italian system of opera and academic and classical music, both in terms of taste and interpretative style and in terms of production and marketing, as well as a social practice the tends to sacralize the liturgies, the sites, and the trappings of opera, exalting its societal and social role as a meeting place, status symbol, and element of distinction.

It is in this background that a diffuse interpretative approach, faithful to the Toscanini-esque myth of remaining 'faithful to the written text' sinks its roots, still generally inclined to issue summary judgments on issues related to the philology of performance and production; this approach still finds supporters in such renowned artists as Salvatore Accardo and Riccardo Muti (see Accardo 1987).[25] This mindset also underlies a certain dramaturgical traditionalism that is widely accepted throughout Italy, and which focuses especially on the magnificence of theatrical production effects. That does not mean that there are no daring creations from courageous and innovative directors, but their work often runs up against the habit of condemning inventive directors as soon as their innovations become too free-handed or disrespectful; this is a habit that has, for instance, resulted in an overall ostracism of the more taboo-shattering directors of the international stage, such as Patrice Chereau or Peter Sellars.[26]

Equally symptomatic have been the recurring incidents in which the better known Italian conductors have clashed openly with foreign directors, protesting what the Italian conductors describe as unacceptable choices made by the foreign directors in terms of a 'correct' interpretation of the text. Comparable motives lay at the cause of the frequent disputes that in the 1990s involved figures such as the artistic director of the Salzburg Festival, Gérard

Mortier, notoriously interested in a decisively anti-traditionalist approach to the staging of opera, and, in opposition to him, such renowned Italian artists as Abbado, Muti, or Pavarotti; artists who are as different as can be, one from another, in terms of orientation and mindset, and yet bound together by their affiliation with a cultural background that remained substantially indifferent, if not openly hostile[27] to the 'Mortier phenomenon'.

It is upon this distinctly traditionalist ideology that the system of musical education and teaching has been based for generations, from primary and secondary schools right up to the conservatories and the new levels of Italian higher academic training, recently introduced with a special reform law which allows conservatories to be considered as educational institutions comparable to universities.[28] This measure has triggered considerable controversies, but it has especially unleashed an embarrassing yet sterile conflict between university administrations interested in establishing or expanding Italian *laurea* courses in musical and musicological disciplines, and conservatories determined to defend their traditional role as the sole institutions accredited for academic training in the field of musical performance and composition.

Until recently, the cultural landscape of Italy's conservatories had been locked into an approach that was already opposed to modernism when it was given its final regulatory code in 1930.[29] Despite the fact that there has been a universal consensus for at least the past fifty years that the programs and regulations of the Italian conservatories are hopelessly backward, even following the passage of the reform law the teaching there is still based on directives and curricula dating back to the first decades of the twentieth century, and in that context the term 'modern' takes on fairly picturesque associations.

Within the confines of this self-enclosed horizon, a closed circuit that runs from the school desks to the professor's lectern – with a direct channel feeding students up until they attain teaching positions – the reform law, five years after it came into force, does not seem at all to have encouraged a genuine return of the field of music to its place in the cradle of humanistic and artistic disciplines from which the structure of Italian academia kept it for so long. Instead, it seems to have sanctioned the separation between two milieux that the law was supposed to have brought together and integrated. The new courses in higher musical education, introduced with a certain degree of independence in nearly all the accredited conservatories and institutes of music, seem to emphasize – rather than a general renewal – a further level of specialization which does nothing more than reproduce and reconfirm the educational models of the past, achieving little more than to expand the repertory to include the academically accepted, serious music of the twentieth century.

In an Italian national context where the musical milieux seem to be in a state of permanent alarm, in a permanent stance of defending a sector that they perceive as being under constant threat, the reform of higher musical education seems to be headed down a predominantly conservative road of defensive

stagnation, with a decided emphasis on the revival of a *high* tradition (where 'high' is synonymous with 'classical'), while the question about just what the overall cultural purposes of musical education might be considered to be at the dawn of the twenty-first century in artistic, cultural, social, and production terms is largely ignored or overshadowed. If we are looking for an indirect confirmation of this musical stagnation with its highly ideological component, we could do no better than to consider the interminable peregrination of a reform law that is considered a crucial priority in the reform of the conservatories, but which has not yet attained passage, only a succession of delays and postponements, from a series of parliamentary sessions. The reform in question is that of the Italian secondary schools (in particular, the higher secondary schools) and, closely linked with it, a more satisfactory placement of music in the curriculum of young people, from the ages of 10 to 18.

In the face of a widespread absence of a basic musical culture among the population at large, unanimously identified as the underlying cause of the musical gap that separates Italy from the rest of Europe, as well as the limited or almost nonexistent interest among Italians for cultural consumption in the field of music, it was a widespread opinion – as well as logically sound – that it was necessary to make some deep-rooted modifications in the two areas of basic education and artistic and professional training. But that is not what happened, and music still continues to be the chronic truant, as it were, in Italian secondary schools, further hindering the fundamental goal of providing school-age Italians with an adequate musical education. Ignored, or almost ignored, for many years in the general planning of educational curriculums or at the worst, present merely as an elective subject, musical education made its first timid appearance in the lower grades of secondary school in 1962 (one hour a week for a year of required study, with the possibility of two more years of elective study), and then only became a permanent presence in the curriculum in 1979 (two hours a week for three years). But even now, with the sole exception of teacher's school, music is generally absent from the curriculums of the upper grades of secondary schools, in the absence of a reform that will finally introduce it.[30]

Both the current situation and the future prospects for an expanded presence of musical education in Italian schools are nonetheless subject to the effects of a powerful traditionalistic prejudice that works in both directions. On the one hand, it tends to consider musical education as a form of learning about beauty, an aesthetic understanding of music as a canonical value, while excluding or reducing to a minimum the practice of music, considered – in keeping with a deep-rooted belief – entirely secondary to the education of a citizen – a citizen about whom we can certainly presume that he will not become a musician. On the other hand, musical education, so eager to put a young person on the right path of the 'correct' comprehension of the world of music, seems to have been transformed into a sort of indoctrination governed by a certain scruple or even a traditionalistic prudery that seems to be obsessed with the spread of a plebeian

taste for popular music, with the invasion of the mass media, and the bombardment of the star system. In a word, an academic approach that mixes the cult of the traditionalistic canon with a very rough adoption of the critical approach of Adorno and the Frankfurt School, adapting them in a marked aversion to the new and the plebeian, and whose main goal is preventing young people from falling prey to the generic 'consumer-driven music' pumped out by the mass media: an extremely vague and 'prohibitionist' concept, an all-inclusive framework for those musical genres that the proponents of this approach would like to exorcise as defective products or to eliminate entirely, banishing them from the earth.

Nowadays, music students in the European Union and in North America, from elementary school to high school, have a broad array of options available to them, with a wide range of possibilities and a chance to study and specialize in the fields that they prefer: classical music, jazz, new technologies, pop music, early music, traditional music, and so forth. In Italy, these options are for the most part not available. New skills, new repertories, and new technologies are making their way into the curriculum but, even in the institutions that were more recently reformed, they encounter great difficulties and stubborn resistance to a full institutional acknowledgment. All of this is the product of an obstinate academic traditionalism that is unwilling to let go of a dogma according to which the only music worthy of being taught and learned is 'high' music, fine music, music that belongs to an unchanging canon that dates back centuries; art music, independent, with a distinction that is as sharp as it is artificial from 'low' music, heteronymous, music that is not art, only a commercial commodity (see Montecchi 2001, 2004). It is precisely on this sharply drawn dichotomy that the defense of public funding for opera houses is based, exalting them as bastions defending the true art of music against the spreading barbarism of the music industry.

Mediascape[31]

Paradoxically, though perhaps not all that paradoxically, the traditionalistic mindset also exerts its influence on the popular music industry which, despite the presence of a number of artists of undoubted excellence, seems to be trapped in a cycle of perpetuating its own second-class status, incapable of endowing itself with a standing of cultural and artistic credibility comparable with that found in the English-speaking world, but also unable to find a role in the decision-making involved in cultural policy and – perhaps – equally stymied in satisfying what we might call a 'demand for identification' by part of that medium or upper intellectual-level public that is such an avid consumer of cultural products and so interested in popular music, but which refuses to identify with a musical genre that is so intensely discredited on a national level and generally dominated by the models spawned by the Festival of San Remo and other similar events.

The problem of the musical audience in Italy, the level of actual or presumed knowledge on the part of the public and therefore of the chosen linguistic models for the communication and the marketing of the music is closely linked to the drastic shortfall of musical education developed during the years of obligatory public schooling. Recent studies confirm that in Italy teenagers show a very strong and deeply rooted interest in – and therefore a spontaneous demand for – music (see ISTAT 1999; Gasperoni *et al.* 2004). Yet, in response to this demand, public schools seem to act more as a discouraging factor than as an instrument of growth and development. Even the institutions, the opera and symphony houses, the musical associations seem incapable of grasping and responding to this youthful demand which, after being substantially let down and failed during the school years, seems to emerge, in the transition to adulthood, for the most part in either a largely unjustified retreat to the models offered by the music industry (and this finds indirect confirmation in the limited size of the Italian recording industry), or else it negatively impacts the offerings from opera houses and concerts, with the disappointing box office performance described above. There exists, nonetheless, as shown by recent studies, at least where the adolescent age group is concerned (Gasperoni *et al.* 2004), a substantial sector of end-users that can neither be classified as passive consumers of industrially produced music nor regular frequenters of concerts and the opera. This sector is a network of impassioned fans, articulated into many and shifting identity-based configurations, whether we choose to call them subcultures or *sound groups*, who provide the support that keeps the marketplace of independent labels alive; they frequent the many music festivals and events that are alien both to the establishment of classical music and to the business of rock and pop music, being devoted instead to specific genres or to cross-over music. This social actor, which cultivates curiosities and interests that are difficult to catalogue and quantify, actually represents a seldom studied presence, a galaxy that is hard to measure and photograph given the general lack of in-depth studies on the social practice of music and listening patterns with respect to music in the daily life of the Italians.[32]

There are few reliable facts and many clichés in circulation about the audience for music and its make-up, except where adolescents are concerned (in-depth studies on that field have been published recently – see Gasperoni *et al.* (2004)).[33] There have been a number of interesting studies about classical music, but they have been restricted to local situations. A study of variations in the make-up of the audience at the Teatro Regio in Turin between 1987 and 1997 (Figure 2) revealed a relatively stable presence of various classes and categories, with a growing presence of a younger audience, increasing from 12 per cent to roughly 16 per cent. This study agrees with the statements of the operatic establishment that, for reasons that are certainly understandable, tends to focus on the increasingly young audience for opera. In the decade that we have examined, in fact, there was an increased presence of students, though, in

percentage terms, that increase is less than half the size of the most noticeable increase in view: a more-than-10 per cent increase in retired people.

A comparable situation, or a situation weighted even more heavily in favor of the elderly, was recorded at the turn of the 1990s at Bologna's Teatro Comunale and at Rome's Accademia di Santa Cecilia (see Figure 3), with audiences in which those over fifty constituted respectively 70.1 per cent and 85.7 per cent. If we compare these percentages with those recorded in 1985 at the Théâtre de La Monnaie in Brussels, we find the reverse situation. There, nearly 40 per cent of the audience consisted of young people under 35, while those older than 60 dropped to 12 per cent. In the Italian cities (Turin, Bologna, and Rome), retirees instead make up on average over 30 per cent of the audience, while young people constitute no more than 15 per cent.

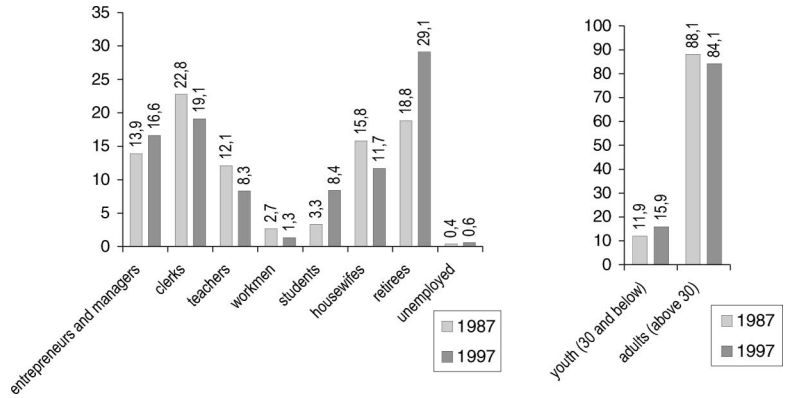

Figure 2 1987–1997: make-up of the audience at Turin's Teatro Regio. Based upon data taken from Cortese (2000: 135).

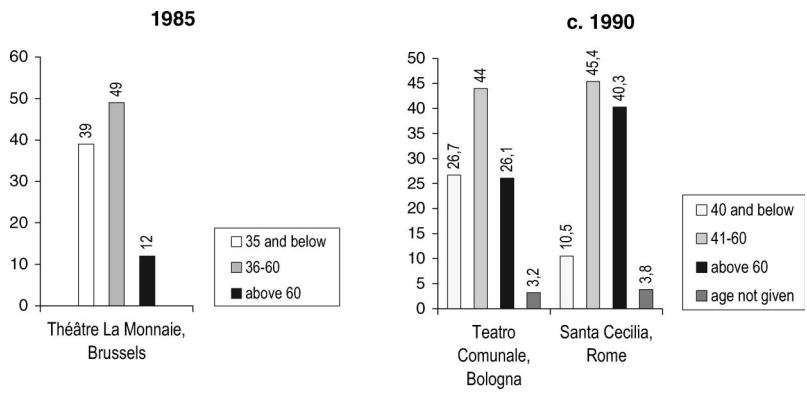

Figure 3 Age of audience at the Théâtre la Monnaie, Brussels and at Comunale, Bologna, and S. Cecilia (Rome) respectively (based upon data taken from Cappelletto (1995: 38)).

Then there is the audience's cultural level: the statistics gathered for the four situations studied (Bologna in 1990, Rome in 1990, and Turin in 1987 and 1997) provide us with some information concerning the 'educational capital' of the audience for classical and operatic music; according to received wisdom, this audience is culturally 'elite'. Figure 4 shows that the 'educational capital' of a decidedly older audience, like the one sampled at the Accademia di Santa Cecilia (see Figure 3), was, in 1990, far greater than that found in Turin, where there were far fewer people with a *laurea*, or college degree, than those holding only a *diploma di scuola superiore*, or high school diploma. Considering that in 1999 in Italy, college graduates represented 9 per cent of population, while high school graduates were 42 per cent (for a total of 51 per cent), in the four situations examined, the percentage of high school and college graduates was 66, 94, 73, and 76 per cent, and was therefore much higher than the national average in those years, as we might well expect (see De Mauro 2004: 22).

Who is the target audience? This question, in both qualitative and quantitative terms, is a crucial point in any analysis and critique of the social and cultural impact of an activity that manages and produces a product that is placed at the absolute summit of the hierarchy of societal approved aesthetic values. The information contained in Figure 2 shows that in Turin in 1997, after retirees, a category that clearly spans many classes, office workers and executives made up the largest share of the audience (together, the three groups constituted 64.8 per cent). At Santa Cecilia in the 1990s, 60 per cent of the audience held college degrees. Opera and classical music (in Italy, even more than in other countries) can be considered the very definition of highbrow (Levine 1988). Yet the way in which the establishment performs its

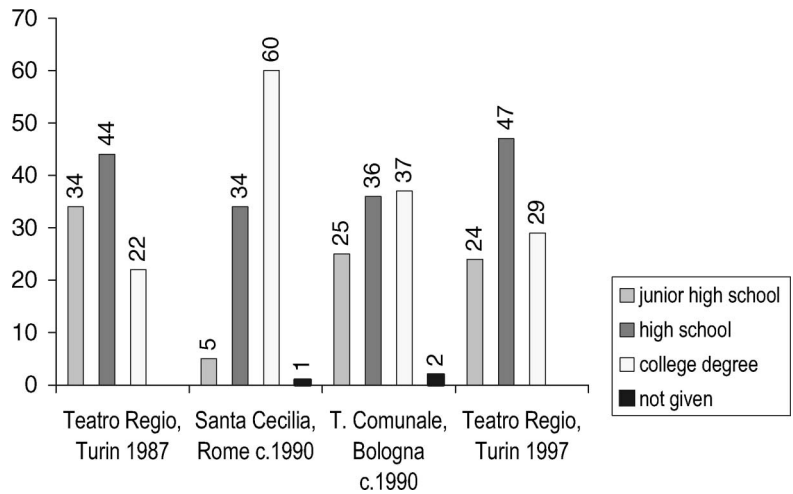

Figure 4 1987–1997: 'educational capital' of the audience in Turin, Rome, and Bologna (based upon data taken from Cortese (2000) and Cappelletto (1995)).

responsibility of administering and diffusing this musical patrimony is at times criticized and opposed, pointed to as an example of cultural stagnation, as either corporative or discriminatory. In some cases, the role and even the value of this patrimony are questioned, in connection with the present-day cultural context. The question of the audience becomes even more of a delicate issue, considering that the chief protagonists of the establishment had been obliged to experience the sensitive transition from autonomous agencies governed by public law to privately regulated foundations, especially in those cases (almost universal) where the health of the box office is a source more of concern than of satisfaction. In the diagrams that follow, it is possible to glimpse, in a context of historical perspective, several of the chief sources of concern to the musical establishment – an establishment that is inevitably alarmist in terms of the need for public funding and equally triumphalist in the areas of self-evaluation and claimed ability to attract large audiences. From 1936 to 1999, the sales of tickets for the opera (see Figure 5) tended to decline as a whole, in parallel with the drop of average attendance at each performance. This drop is especially drastic (see Figure 7) if it is measured as a percentage, taking into the account the increase in the overall population (from about 42 million in 1936 to the more than 57 million in 1999). A completely different panorama is seen over the same period for concerts, which show an almost continuous increase, both in absolute terms (Figure 6) and in percentages (Figure 7).

As we can see, in a little over 60 years, the number of concerts has increased more than five-fold, while the audience numbers have grown to a slightly smaller degree. For both sectors, opera and concert, this is a phenomenon of historic scope. The period following the Second World War was the period in which in Italy the typically bourgeois practice of public concerts, following a lengthy and laborious period of gestation, was finally consolidated, attaining a level of diffusion comparable with other European countries, where this custom had been solidly established for at least a couple of centuries. In a

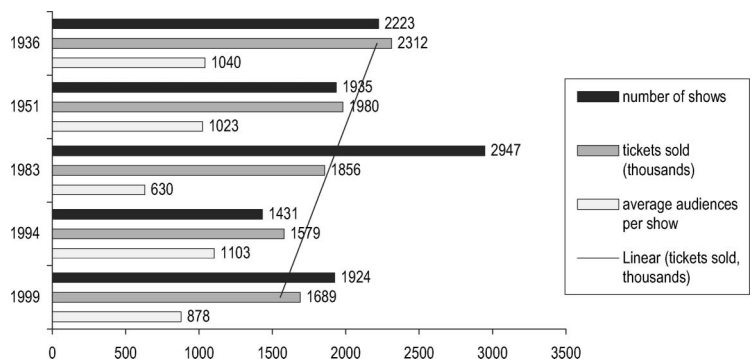

Figure 5 Opera in Italy from 1936 to 1999: number of performances, tickets sold, average audiences (data taken from: Trezzini and Curtolo (1987) and Ruggieri and Lunghi (1996)).

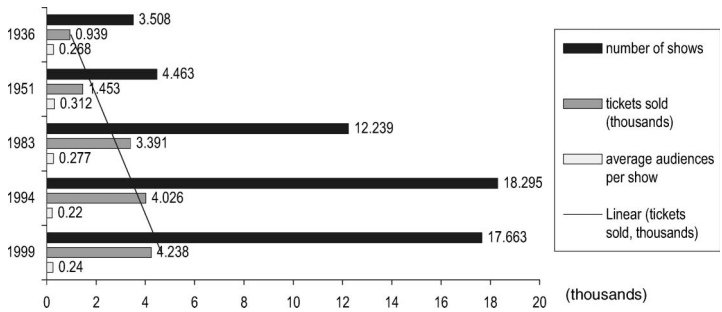

Figure 6 Concerts in Italy from 1936 to 1999: number of performances, tickets sold, average audiences.

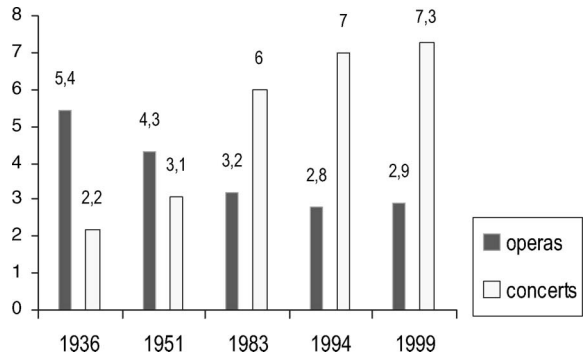

Figure 7 Opera and concerts in Italy from 1936 to 1999: comparative trends of audiences (tickets sold) as a percentage of the national population.

certain sense, the concert is one of the factors that competes with opera, contributing (though it is hard to calculate to what degree) to a downward trend in terms of production and number of tickets sold. We should point out in the chart in Figure 5 the effects of substantial subsidies that allowed, for example, in the years between 1951 and 1983, an increase of more than 65 per cent of production in quantitative terms, despite a drop in total audience of more than 38 per cent. Although opera received subsidies equivalent to 80 per cent of the total funding allocated to the music sector, opera does not seem able to reverse its drop in popularity,[34] which is the opposite of the situation for concerts, which despite objective shortages in funding, seem to be a sector in continual expansion.

If we examine the data from a study done in 1995 by the Istituto Centrale di Statistica (ISTAT 1999: 74) it comes as no surprise to learn that more than 70 per cent of Italian young people between the ages of 18 and 24 love to dance (see Table 9). It is surprising, however, to learn that between 20 and 40 per cent of young people up to the age of 19 declare that they play or even

Table 9 Percentage of people stating that they engage in some musical activity

Age	*6–10*	*11–14*	*15–17*	*18–19*	*20–24*	*25–34*	*35–44*	*45–54*	*55–59*	*60–64*	*65–74*	*75...*	*Average*
Playing or composing	19.0	40.0	22.7	19.0	15.5	9.6	6.1	4.1	2.9	3.2	2.1	0.8	9.1
Singing	26.1	26.4	25.5	24.3	21.3	13.1	8.6	6.6	6.1	4.1	3.7	1.9	11.5
Dancing	15.3	33.9	65.1	73.9	71.6	48.7	30.1	23.2	17.3	12.4	7.4	1.3	31.2

compose music. This percentage is even higher, according to a very recent study commissioned by the Società Italiana di Educazione Musicale (SIEM, or Italian Society for Musical Education); according to this study, more than 60 per cent of young people state that they know how to read music and play a musical instrument.[35] Whatever the situation may be for young people, this percentage, as we can see in Table 9, drops sharply with the passage into adult life, finally reaching far more 'reasonable' levels. This phenomenon may have a number of explanations, and yet it is difficult to imagine that school and the world of musical production have no responsibility for this drop in interest.

In fact, while Italians receive very limited encouragement while they are young to explore the world of music, as adults they manifest to only a very limited degree those forms of behavior that are the best indicators of a generic interest in music. We already know that the Italians who belong to the higher social and cultural classes attend concerts and the opera far less frequently than do their fellow Europeans. That's not all: Italians of all classes buy very few records, and it this statistic, far more than the anomalies of the operatic world and the schools of Italy, that most clearly indicates an objective dissimilarity between Italy and the rest of Europe in the field of music.

In 2004, 60 million Britons spent about US$3.5 million on records, while 58 million Italians spent only a little over US$650,000. The chart in Table 10 contains sales figures for Italy and six other European countries for the years 2001 and 2004 for audio media of all sorts, figure that are derived from the annual report of the International Federation of Phonographic Industries (IFPI 2002 and 2005a), published annually. As the reader can see, in Italy a far smaller number of audio media is sold than in countries like France, Germany, or Great Britain, while the average price of records is one of the highest in Europe. An average German purchases four times as many records as an average Italian, while a Briton purchases six times as many, a Dutchman buys three times as many, and so on. Even Spain, though its population is much smaller than Italy, actually has a larger market.

When considering these figures, one thinks almost inevitably of music piracy, a phenomenon of considerable concern to major recording labels around the world, cited as the chief cause of a market crisis that has lasted for several years now.[36]

According to the latest annual report on the clandestine recording market prepared by IFPI (which does not take into account illegal downloading), 'global pirate sales totalled an estimated 1.5 billion units in 2004, worth US$4.6 billion at pirate prices' (IFPI 2005b). Also in 2004, the value of the worldwide market is estimated to be about US$33.6 billion for a total of about 2.8 billion units. In Europe, the value of the illegal market in 2004 was estimated to be just a little less than 10 per cent of the official market. In Italy, however, according to estimates from the Federazione dell'Industria Musicale Italiana (FIMI), which represents the recording majors, the impact of piracy is about 25 per cent, a much higher value than the European average.[37]

Table 10 Sales of CDs and music DVDs in Italy and several other European countries in 2001 and 2004

Country (millions of inhabitants in 2001)		*CDs and DVDs sold (unit millions)*		*CDs and DVDs purchased per capita per year*		*Value of the retail market‡ (millions of US$)*		*Average cost per unit‡ (in US$)*	
		2001*	2004†	2001*	2004†	2001	2004	2001	2004
United Kingdom	59.8	218.6	182.3	3.66	3.05	2,808.7	3,508.7	9.84	16.32
Germany	83.2	184.5	158.1	2.22	1.90	2,128.6	2,149.0	8.20	10.90
France	59.8	125.2	115.4	2.09	1.93	1,828.3	1,979.3	10.64	14.69
Spain	40.0	71.1	37.5	1.77	0.94	613.0	572.8	7.61	14.58
Italy	57.7	38.0	35.1	0.66	0.60	524.7	652.5	10.77	16.86
Netherlands	16.0	31.5	28.5	1.97	1.78	435.7	507.7	11.84	16.01
Russia	145.5	11.4	58.2	0.08	0.41	223.0	490.8	1.99	4.12

*CDs.
†CDs + DVDs.
‡All audio and video formats (single, LP, cassette, CD, SACD, DVD, MiniDisc, VHS, etc.).

Conclusion

The panorama described here is certainly not complete; it fails to capture all the nuances of so complex a picture as that of the musical scene which, even in Italy – despite an admitted tendency to stagnation, which we have attempted to document here – is exceedingly dynamic and changing, both on a local and an overall level. In this survey, we have largely overlooked (despite continual references to it) popular music, which would have demanded a completely different type of documentation and, perhaps also a different methodology.[38] Taken as a whole, the Italian musical scene nowadays – if we restrict our considerations to the immediate present – leaving aside a few artists of world stature, such as Abbado or Pollini, a few stately relics of opera, such as Pavarotti, world-famous composers, such as Luciano Berio (who died recently) or Ennio Morricone, has very little to offer the international musical scene. There are a few noteworthy artists working respectively in the fields of pop, rock, jazz, techno, and traditional music, but few of them indeed can command the sort of international reputation or renown that they might perhaps deserve and which instead seems to have been allotted to certain figures producing a more commercial and sentimental pop music, such as Andrea Bocelli, or Laura Pausini and Eros Ramazzotti, who are especially aided by the special links they have with the many communities of Italians living overseas. We need only take a few steps backward in time, however, and open the archives of history, and Italian music, from Monteverdi and Puccini to Caruso and Domenico Modugno, pours forth an inexhaustible cornucopia of great creations.

In the face of the present-day lack of dynamism (which in some cases constitutes a full-fledged conservative bunker mentality) on the part of institutions, management, universities, the recording industry, and, last but not least, the chief players, that is, the musicians and their main counterpart, the public, one gathers the impression that, musically speaking, Italy has been living for too long off of principal, resting on its laurels and producing nothing for the future. There are no indications of a new direction in musical development and the idea of a new sense of momentum in this sector appears quite unlikely in the present state of affairs, especially if we consider that the general situation appears to be one of recession in all sectors of cultural policy. In short, alongside old conditions of equilibrium that are beginning to collapse, incapable of supporting inefficient and excessively costly structures, inequities, exclusions, and underdevelopment of all varieties are perpetuated.[39] In this context, the guardians of the highbrow tradition continue to store up justifications to stoke their indignation and their rejection of a social atmosphere that they view as having fallen prey to a depressing anticultural state of drift. Yet, at the same time, they remain willing, even eager, to drop all their intellectual and elitist pretensions, swept along as they are by the quest for any and all expedients that might allow them to beef up the box office revenue. In their turn, executives in the recording industry and those in the pop music business, obsessed with their

steadily dropping revenue, shut the door on the possibility of taking a risk on innovation, fearful as they are of losing profits that are no longer coming in anyway. Their goal is another (in a certain sense, similar to that of their colleagues in high places), and in a time of general crisis it is a goal that is given absolute priority: sell more records. Those who suffer as a result of all this are the end users, who are faced with an array of products of increasingly questionable quality at increasingly prohibitive prices.

What remains is school and teaching, crippled however by the grievous grey areas of recent policies, which point to a worrisome disinvestment of resources. Moreover, as Tullio De Mauro has observed, 'there is no education policy that can be developed effectively without creating a national network of centers for the education of adults' (De Mauro 2004: 37). However, Italy is almost completely unprepared in this area, and is further burdened with a level of illiteracy that puts the country at the bottom of the rankings in Europe.[40]

In the final analysis, the malaise that plagues Italian music, from the stuccoed decorations of La Scala to the young man playing a piece by Clementi on his aunt's piano, and all the way out to the garage on the outskirts of town, where a group of teenagers cluster around a drumset and a pair of amplifiers, can be summarized in the fact that the Italians are losing or have already lost their musical identity. There is a strong heritage based on the tradition of 'bel canto' and the opera, but there also exists a folk patrimony of traditional music that is certainly as rich as, if not richer than any other in Europe. Alongside that consideration we should consider the flourishing tradition of the Italian *canzone* that in the twentieth century constituted one of the great moments for popular music. Alongside these genres and traditions there is a great array of features of identity based on nationality or regional, generational, or subcultural affiliation. These are identities that seem for the most part to be living in the past, with a retrospective view; identities that have been gradually facing away over the last few decades and which, even if they sometimes preserve a powerful cultural hegemony at the local level (suffice it to consider the Neapolitan *canzone*), in other cases seem barely to eke out a survival, marginalized, incapable of recognizing themselves in the shabby relics of a past that has long since been buried, one might say, rendered barren. Often these are conflicting identities, and generational factors expose them to the threat of extinction. This is true, for instance, of the tradition of the 'ballo liscio', or else – though the institutional foundations here are far more solid – fans of opera (known in Italian as '*melomani*'), whose median age continues to inch upward, without any indication of an influx of younger members. A renewal of the audience for opera, sufficient to allow a theoretical generational 'changing of the guard', would require a profound shift of outlook and strategies, a deep-seated cultural transition that would be capable of repositioning and redefining genres, repertories, and practices in a context in which the past and the present – rather than facing off or being mutually exclusive, in keeping with the paradigm of traditionalism – would instead interact, enriching one another reciprocally with meaning.

The case of opera houses can be seen as emblematic of these challenges. Faced with a dropping audience and shrinking resources, the responses of the directors of the opera houses seems to be limited to a few unconvincing gestures, which do little more than to stick a finger in a crumbling dike: for example, inserting a musical into the season's schedule of opera in the forlorn hope of capturing the interest of a younger audience, or else renting out the theater as a venue for prestigious show rooms or fashion runway presentations, or finally the below-cost online sale of last-minute unsold tickets (at prices as little as one-tenth of the box-office price). This is, in other words, underselling a tradition and a total inability to find an active and vigorous presence in the contemporary arts scene. As Tullio De Mauro puts it: it is certainly not possible to educate the young if the adults are incapable of educating themselves.

There does not exist, nor could there be, a single actor capable of rebuilding some hypothetical musical identity for the Italians, capable of restoring to them a full and modern sense of their extraordinary musical heritage and making that heritage the ideal platform for the future of Italian culture: a future that – we should be clear – can and must navigate a landscape filled with unprecedented transcultural dynamics. At this point in time, the necessary conditions to ensure that a concrete new Italian musical identity could come into existence would require unprecedented institutional synergies and reversals of direction in the areas of cultural policy, economic conditions, and collective behaviors, at a level that can only be described as utopian.

All the same, the individuals and entities that are working for change and renewal in this overall sector, though few in number, are powerfully motivated and highly qualified. One possible point of departure would be to attempt to ensure that the vast constellation of the non-institutional (and often, unprotected by formal employment contracts) which includes the countless independent events devoted to new and heterodox music, musicians devoted to non-academic research, scholars and musicologists who are not aligned with the official world, teachers, publishers, and associations of scholars, such as the Società Italiana di Educazione Musicale (SIEM, or Italian Society for Musical Education) or the Italian branch of the International Association for the Study of Popular Music (IASPM), might succeed in coalescing into a 'system', from the fragmented entities that they are currently, coordinating their activities in order to make a greater impact in a context that, in any case, remains very difficult to modify.

Notes

1 For the concepts of financescape, ideoscape, mediascape, technoscape, and ethnoscape, see Appadurai (1996).
2 See www.cematitalia.it/cemat/infocemat/fus/protestafus.htm (accessed 30 June 2006).
3 As an example of this distinct heterogeneity, see the study commissioned by the European Commission and by the Ministries of Culture of Spain and France (1997).

For the area of music, the best study in the vast comparative survey between systems of demand and supply in various European countries found in Trezzini and Curtolo (1987).

4 Even the European Union has become active in this field. First the Council of Ministers and later the European Commission established working groups, the first of which was the LeG Culture (Leadership Group on Cultural Statistics), which was tasked with developing methodologies for harmonizing cultural statistics on a community-wide scale. See LeG Culture (2001, 2002), Task Force on Cultural Expenditure and Finance (2001), and Gazzelloni (2000). Among the other Europe-wide initiatives, we should point out the website *Cultural Policies in Europe*, 'an expanding Europe-wide information system on cultural policy measures, instruments, debates and trends' (Council of Europe – ERICarts, 2002). Specifically focusing on music is the European Music Office (EMO), 'an international non-profit association bringing together professional organizations, associations and federations from the music sector within the European Union' [www.musicineurope.org/ accessed 30 June 2006]. See Laing and Rutten (1996).

5 The transformation was begun by the legislative decree no. 367 dated 26 June 1996, which was later followed by many other measures, necessitated by the problems and delays encountered by the *Enti Lirici* (Autonomous Opera Houses) in complying with the new legal norms.

6 See Carlo Fontana's 'Introduzione' to ANELS (1992: XI). Carlo Fontana was general manager of the Teatro alla Scala from 1990 to 2005.

7 See Cesare Romiti's 'Prefazione' to ANELS (1992: XV). Cesare Romiti was the managing director of the Fiat Corporation from 1976 until 1996, when he was appointed president of the corporation, an office he held until 1998.

8 See Cappelletto (1995: 13); the table is based on statistics from the Associazione per l'Economia della Cultura (Association for the Economics of Culture).

9 In this connection, we should mention the contents of 'Unmanageable opera', a Ph.D. thesis presented in 2000 at the City University of London, devoted to a comparative study of the management of five different European opera houses: 'The aim was to select a set of organisations that would represent the main areas of operatic activity. ... The organisations included represent these areas, with the exception of Italy due to the withdrawal of the Teatro alla Scala' (Auvinen 2000: 62). Recently, a prominent Italian musical monthly that had planned to carry out an investigation on relations between opera singers, management agencies, and opera houses was obliged to abandon the project, because it could not find anyone willing to work on the subject.

10 In this connection, the reader should compare the data in Tables 2 and 3. In 1990, 1991, and 1992 the 13 Italian *Enti Lirici* spent an average of 96, 96.1, and 95.7 per cent of their total personnel spending on permanent employees (not including visiting artists). In 1997 at the Finnish Opera, out of 583 employees, only 451 (77.3 per cent) were permanent employees. At the Deutsche Oper in Berlin, in 1998, 91.2 per cent of employees were permanent. There was quite a different situation at the Paris Opéra, which has no permanent artistic staff. There, in 1998, only 21.4 per cent of the nearly 1,400 employees had open-ended employment contracts.

11 The chart is based on box office figures taken from the websites of twenty-four Italian and European opera houses.

12 A number of the historic opera houses of the great European capitals, and likewise the major opera festivals, put very high prices on the best seats: for instance, Covent Garden (London), £155.00; Bayreuth Festival, €183.00; Salzburg Festival, €340.00; Ferrara Music Festival, €250.00 (prices refer to 2002 – 2003). Nonetheless, nearly all the opera houses and festivals in Europe present sharp differences between the various price levels, offering truly affordable admission prices, which are also

generally lower than the lowest prices of the Italian opera houses. For the 2004–2005 season at the Teatro alla Scala, the prices range from €170.00 to €10.00 for standing room. At the Wiener Staatsoper, the top price for a seat is €178.00, but standing room costs €2.00, one-fifth the cost at La Scala. Also, there are opera houses that stage gala opening evenings at much higher prices than the actual first nights. For the inaugural party at the Metropolitan in New York, September 2004, prices went as high as US$1,000.00; for the inaugural gala at the San Carlo in Naples – December 2004 – the highest price was €200.00 as against the €120.00 of first nights. The most startling case is the traditional inauguration of the opera season at La Scala, which is held every year on 7 December. In 2002 and 2003, at the Arcimboldi, because the historic site of the Piermarini was closed for renovation, the prices ranged from €1,000.00 to €30.00. For the reopening of the renovated opera house, on 7 December 2004, the prices ranged from €2,000.00 to €700.00 for preferred or box seats and from €350.00 to €50.00 for a balcony seat.

13 The share subsidized by the state, which was 56.3 per cent in 1990 dropped gradually to 50 per cent in 2000. See Cicerchia (1999), Leon (2004) and European Commission and Ministries of Culture of Spain and France (1997).

14 Data taken from Council of Europe–ERICarts (2002); European Commission and Ministries of Culture of Spain and France (1997); Cicerchia (1999); 'Bulletin de la Direction de l'action stratégique, de la recherche et de la statistique du Ministère de la Culture et des Communications du Québec', 2 October 1999 [http://mcc.quebectel.qc.ca/]. The Euro went into effect as the sole European currency on 1 January 1999, and actually went into circulation three years later, on 1 January 2002. Nonetheless, frequently the sources used make use of statistics expressed in Euros for periods prior to the entry into circulation of the new currency. Those sums are probably based upon the equivalency of the Euro and the ECU, the European Community accounting unit that was adopted beginning in 1979 by countries belonging to the European Monetary System. As for the Italian currency, the value of the Euro, upon its establishment in 1999, was established at Lire 1,936.27. As for the conversion of various currencies into Lire, see note 12.

15 For Germany, estimates clash. The data shown in Table 8 are taken from the statistical surveys published in *Jahrbuch für Kulturpolitik* (Söndermann, 2000, 2002/03). They differ sharply from the data of the '*Kulturfinanzbericht 2000*' (Statistisches Bundesamt 2001), according to which in 2002 spending on culture was €6.3 billion, with per capita spending of just €76.69 (see Council of Europe–ERICarts (2002)).

16 The percentages of funding for the performing arts as against overall cultural funding reported in the Task Force on Cultural Expenditure and Finance (2001), are different from those reported in Council of Europe–ERICarts (2002) (see Table 8): Austria (1999) 32.7 per cent; France (1996) 25.7 per cent; Germany (1998) 39.2 per cent; Italy (1995) 15.5 per cent. This disagreement however does nothing more than to confirm the fact that in Italy the share allocated to this sector is far smaller than in other countries.

17 For music, the percentage shares of the FUS in 2004 are as follows: *Enti Lirici* 47.8 per cent; musical activity 14.07 per cent; dance activity 1.74 per cent. In 2004 this meant: €239 million for the *Enti Lirici*; €170.3 million for other musical activities; €8.7 million for dance.

18 Beginning in October of 2003 the *Enti Lirici* – now called Fondazioni (Foundations) – grew to fourteen in number with the addition of the Teatro Petruzzelli in Bari, now being rebuilt, following its destruction in a devastating fire in 1991. Another opera house that was recently rebuilt, after the 1996 fire that almost completely destroyed it, is La Fenice in Venice.

19 See Ministero per i Beni e le Attività Culturali (2005: 15). For the years following 2004, the reductions were even more expansive, triggering widespread protests in the sector in response to the massive and threatening cuts. In 2005 the FUS dropped

to about €464 million. For 2006, after the government was forced to back down on the decision to reduce it to €300 million, the sum should be about €400 million, with a real value of about half of what it was in 1985.

20 Law of 21 November 2000, no. 342. This is a partial law, which does not call for the deduction of contributions made by a private individual.

21 See *Imprenditori e mecenati* (unsigned article), *Corriere del Giorno*, 18 August 2004, available at http://www.patrimoniosos.it/rsol.php?op=getarticle&id=7055 (accessed 30 June 2006).

22 See AAFRC (American Association of Fundraising Counsel) (2004), *Giving USA 2004*, at http://www.aafrc.org/ (accessed 30 June 2006).

23 In Italy, professional musicians are trained in the 58 State Music Conservatories and in the 21 accredited Institutes of Music, run by city governments. During the 2004–2005 academic year, according to government statistics, there were 41,341 students enrolled in conservatories and accredited institutes. In these schools, education was focused only upon classical music, with the exception of a few jazz professorships that involved perhaps 1 per cent of the students enrolled. A few years ago, with the Law of 21 December 1999, no. 508, the reformation of musical education was started, which would lead over the course of a few years to a profound change in the approach employed in this sector of public education. Yet, even today, a sizable proportion of the professional musicians who teach in the conservatories or who work in symphony orchestras, have only Italian junior high school diplomas – aside from the Italian conservatory diploma, where the traditional curriculum is limited exclusively to musical practice, with no education of a cultural or humanistic nature (with the exception of music history) – and therefore present an embarrassing shortcoming in terms of scholarly or cultural capital. The level of education increases, of course, among the younger generations, even though it is still quite rare today to find musicians who have both an Italian conservatory diploma and an Italian university degree, or *laurea*.

24 Italy today possesses excellent musicians and ensembles performing Renaissance and Baroque music, though for the most part they received their training outside of Italy. It has only been in recent years, in fact, that education and training in the performance of pre-classical music has begun to make its first timid appearance in Italian musical conservatories, following decades of exclusion.

25 One notorious case – though it was unjustifiably emphasized by the predictable uproar that ensued – was Muti's decision, with respect to the performance of Verdi's *Il Trovatore* at the Teatro alla Scala (2000–2001 season), to eliminate in the celebre *cabaletta* 'Di quella pira' the concluding high C, which does not appear in the original score, but which became over time part of the tradition of the production of this opera, ultimately becoming a veritable piece of bravura in a tenor's repertoire. In the name of restoring the score to its original form, freed of all subsequent 'encrustations', the elimination of the high C was justified by the simplistic observation that if the composer did not put it in the score, he clearly did not want it included.

26 Unless I am much mistaken, neither of the two directors has ever been invited to Italy to direct a new production of an opera. However, many years ago Peter Sellars polemically declared that he would never set foot in Italy to direct an opera there.

27 In 'Il Corriere della Sera' and other publications in Italy, the comments and reviews have targeted Gérard Mortier for the most part, questioning a number of his decisions, gratuitously portraying them as provocative, demagogic, or artistically mediocre. See for instance Colombo (1997).

28 Law of 21 December 1999, no. 508.

29 Royal Decree of 11 December 1930, no. 1945.

30 For an overview that dates back several years but which remains interesting in its treatment of the overall problems of musical education in Italian schools, see

Grazioso (1994) and also Ferrari (2002). As far as graduate-level education is concerned, in recent years among various universities there has been a proliferation of courses and seminars devoted to popular music and master's degrees focusing on musical management and communications. In the conservatories as well, though to a lesser degree, we are seeing the first steps toward this orientation in terms of teaching and research.

31 The term coined by Appadurai is used here metonymically with reference to the diffusion of music not only through recordings but also live performance (concerts, opera, etc.). In this section, there is no examination of the radio and television sector because no significant data are available for our purposes.

32 See in this connection Torti (2000).

33 Paradigmatic, in this connection, given its inability to focus upon the social landscape of musical consumption and practices is the previously cited research project carried out by ISTAT, *La musica in Italia*.

34 In the postwar years a negative trend can be seen in other countries as well, such as France, Great Britain, and the Netherlands. In Germany, however, between 1949 and 1982, the annual total audience at opera performances rose from about 3 million to over 5 million. See Trezzini and Curtolo (1987).

35 See Gasperoni *et al*. (2004: 40). Unfortunately, it was not possible to determine from the answers what instruments these young people play. Because if we are talking about the recorder (the instrument called for in the musical education programs), then we are talking about the mere rudiments of musical practice taught in school, while if instead we are talking about the guitar or other instruments then clearly we are dealing with specific interests and preferences.

36 According to the IFPI estimates mentioned above, over the course of five years, overall global sales of recording media dropped from 3,657,200,000 units in 2000 to 2,755,700,000 billion units in 2004, with an overall decline of 24.65 per cent. Positive trends emerged, in contrast, in the sharp increase in sales of DVDs, and in rapid expansion of the market for digital music purchased legally online. According to the IFPI, between 2004 and 2005, the global market for digital music tripled, rising from US$380 million to US$1.1 billion.

37 See FIMI press release 23 June 2005 [http://www.fimi.it accessed 30 June 2006]. The estimates of the IIPA (*International Intellectual Property Alliance*) in its *2006 Special 301 Report Italy* are slightly different: according to the IIPA, the size of the clandestine music market in Italy is shrinking, dropping from 23 per cent in 2004, to 20 per cent in 2005 [http://www.iipa.com/countryreports.html]. As for the peer-to-peer downloading of music files, it is estimated to be smaller in Italy than in countries like the UK or France, which both have a larger number of broadband Internet connections. In 2005 in Italy, there were 6.7 million broadband Internet connections as against 10.7 million in Germany, 9.8 million in the UK and 9.9 million in France. See Mueller (2006).

38 An investigation into popular music in a panorama such as that found in Italy, which, to make reference once again to Appadurai's model, could be called at the very least, 'disjunctive', would most likely be required to explore not only the three 'panoramas' considered, but also the ethnoscape and technoscape (see note 1).

39 With reference to the theme of underdevelopment, De Mauro (2004) carries out a merciless examination of the many inadequacies that afflict the cultural system in Italy.

40 De Mauro (2004: 23). In Italy, there are 2 million total illiterates; 15 million semi-illiterates; and 66 per cent of the population has reading and writing deficits, as compared with a European average of 50 per cent.

References

AAFRC (American Association of Fundraising Counsel) (2004) 'Giving USA 2004. The Annual Report on Philanthropy for the Year 2003', http://www.aafrc.org/ (accessed 30 June 2006).

Accardo, Salvatore (1987) *L'arte del violino*, Milan, Rusconi.

ANELS (Associazione Nazionale degli Enti Lirici e Sinfonici) (no date listed, but it was 1992) *Dietro il sipario. Libro bianco sulla gestione degli Enti Lirici e Sinfonici 1987–1990*, Turin: Fitzcarraldo.

Anon (1996) 'Pavarotti: canterò da solo in Piazza San Marco', *Il Corriere della Sera*, 31 January 1996.

Anon (2004) 'Imprenditori e mecenati', *Corriere del Giorno*, 18 August 2004, available at http://www.patrimoniosos.it/ (accessed 30 June 2006).

Appadurai, Arjun (1996) *Modernity at Large: Cultural Dimensions of Globalisation*, Minneapolis, MN: University of Minnesota Press.

Auvinen, Tuomas (2000) 'Unmanageable opera. The artistic–economic dichotomy and its manifestations in the organisational structures of five opera organisations', Ph.D. thesis, City University, Department of Arts Policy and Management, London.

Bandettini, Anna (1996) 'Muti: che brutta figura col mondo', *La Repubblica*, 31 January 1996.

Cappelletto, Sandro (1995) *Farò grande questo teatro. Storia recente dell'Opera a Roma e in altre città*, Turin: EDT.

Cicerchia, Annalisa (1999) 'La spesa pubblica per la cultura e lo spettacolo in Italia nella prima metà degli anni '90', *Economia della Cultura* 9(1): 119–28.

Colombo, Francesco M. (1997) 'Salisburgo, uno scandalo banale', *Corriere della Sera*, 8 August 1997.

Cortese, Luigi (2000) 'Il mutato rapporto dei giovani con la lirica', *Lo spettacolo* 50(1–4): 133–44.

Council of Europe–ERICarts (2006) 'Cultural policies in Europe. A compendium of basic facts and trends', 7th edn., available at www.culturalpolicies.net/ (accessed 30 June 2006).

Dahlhaus, Carl (1983) *Foundations of Music History*, Cambridge: Cambridge University Press.

De Mauro, Tullio (2004) *La cultura degli italiani*, ed. Francesco Erbani, Rome-Bari: Editori Laterza.

European Commission and Ministries of Culture of Spain and France (1997) *Statistiques de la culture en Europe. Premiers éléments*, Paris: ERIES/DAFSA.

Ferrari, Franca (2002) 'Educazione musicale e mass media', in *Enciclopedia della musica*, directed by Jean-Jacques Nattiez, vol. II: *Il sapere musicale*, Turin: Einaudi, pp. 846–62.

Gasperoni, Giancarlo, Luca Marconi and Marco Santoro (2004) *La musica e gli adolescenti. Pratiche, gusti, educazione*, Turin: EDT.

Grazioso, Giuseppe (ed.) (1994) *L'educazione musicale tra passato presente e futuro*, Milan: Ricordi.

IFPI (International Federation of Phonographic Industries) (2002) 'The Recording Industry World Sales 2001', http://www.ifpi.org (accessed 30 June 2006).

———. (2005a) 'The Recording Industry World Sales 2005', http://www.ifpi.org (accessed 30 June 2006).

———. (2005b) 'The Recording Industry 2005. Commercial Piracy Report', June 2005, available at http://www.ifpi.org/site-content/antipiracy/piracy-report-current.html (accessed 30 June 2006).

IIPA (International Intellectual Property Alliance) (2006) '2006 Special 301 Report Italy', available at http://www.iipa.com/countryreports.html (accessed 30 June 2006).
ISTAT (Istituto Centrale di Statistica) (1999) *La musica in Italia*, Bologna: il Mulino.
Laing, Dave and Paul Rutten (eds) (1996) *Music in Europe*, Brussels: European Music Office, available online at www.icce.rug.nl/~soundscapes/DATABASES/MIE/General_contents.html (accessed 30 June 2006).
LeG Culture (Leadership Group on Cultural Statistics) (2001) 'Cultural Statistics in Europe', available at http://forum.europa.eu.int/public/irc/dsis/edtcs/library (accessed 30 June 2006).
———. (2002) 'Cultural Statistics in the EU. Part I: Final Report', available at http://forum.europa.eu.int/public/irc/dsis/edtcs/library (accessed 30 June 2006).
Leon, Alessandro F. (2004) 'Enti lirici: conseguenze della trasformazione in fondazione', in Alessandro F. Leon and Marcello Ruggieri (eds), *Il costo del melodramma,* special issue of *Economia della cultura*, Bologna: il Mulino.
Levine, Lawrence W. (1988) *Highbrow/Lowbrow: The Emergence of Cultural Hierarchy in America*, Cambridge, MA: Harvard University Press.
Mayer, Arno J. (1981) *The Persistence of the Old Regime. Europe to the Great War*, New York: Pantheon.
Ministero per i Beni e le Attività Culturali (2005) *Relazione sull'utilizzazione del Fondo Unico per lo Spettacolo. Anno 2004*, Rome: Osservatorio dello Spettacolo.
Montecchi, G. (2001) 'Nuove Pratiche Musicali al Conservatorio di Parma', *Musica Domani* 31(119): 16–21.
———. (2002) 'Mentalità tradizionalista e cultura musicale', *il Mulino* 51(5): 918–29.
———. (2004) 'Si può vivere felici studiando o insegnando musica?', *Musica Domani* 34(132): 12–17.
Mueller, Katja (2006) 'World Broadband Statistics: Q4 2005', available at www.point-topic.com/home/press/dslanalysis.asp (accessed 30 June 2006).
Pasqualetto, Claudio (1996) 'La Fenice distrutta, Venezia sgomenta', *Il Corriere della Sera*, 30 January 1996.
Ruggeri, Marcello and Barbara Lunghi (1996) *Lo stato della Musica. Rapporto CIDIM 1994–95*, Rome: CIDIM.
Söndermann, Michael (2001) 'Zur Lage der öffentlichen Kulturfinanzierung in Deutschland. Ergebnisse der Kulturstatistik', *Jahrbuch für Kulturpolitik 2000*, Essen: Klartextverlag, pp. 341–71.
———. (2003) 'Wie hat sich die öffentliche Kulturfinanzierung weiterentwickelt?', *Jahrbuch für Kulturpolitik 2002/03*, Essen: Klartext Verlag, pp. 383–408.
Statistisches Bundesamt (2001) *Kulturfinanzbericht 2000*, Stuttgart: Metzler-Poeschel.
Tambling, Jeremy (1994) 'Opera in the distraction culture', in Jeremy Tambling (ed.), *A Night in at the Opera*, London: Libbey & Co.
Task Force on Cultural Expenditure and Finance (2001) 'Report by the Task Force on Cultural Expenditure and Finance', available at http://forum.europa.eu.int/public/irc/dsis/edtcs/library (accessed 30 June 2006).
Torrefranca, Fausto (1912) *Puccini e l'opera internazionale*, Turin: Bocca.
Torti, Maria Teresa (2000) 'Giovani e ''popular music'' nella ricerca sociale italiana', *Rassegna Italiana di Sociologia* 41(2): 291–302.
Trezzini, Lamberto and Angelo Curtolo (1987) *L'Europa della musica. I teatri d'opera nei paesi della CEE*, Bologna: il Mulino.
Veronesi, Sandro (1992) 'Accuso il melodramma: non è cultura', *L'Unità*, 28 December 1992.