



Towards a classificatory organology of the *viola* and the *violão* in nineteenth-century Rio de Janeiro

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Abstract

This article investigates the organology of the *viola* and the *violão* in nineteenth century Rio de Janeiro discussing the difficulties of tracing a history of those instruments and uncertainties in their terminology, morphology and number of strings. It shows how the (cross-cultural) Hornbostel-Sachs (1914) system of classification of musical instruments translated into Portuguese creates problems for the study of plucked chordophones in the Luso-Brazilian context. Yet this work questions canonical histories of the guitar in Europe showing that despite some lines of descent having been traced previously to explain the creation of the modern instrument, the very characteristics of guitar-like instruments make it difficult for historians to categorise those chordophones. The author concludes the paper by proposing that a continuum can be drawn between the *viola* and the *violão* which he suggests can encapsulate the various reference points of organological difference among the multitudes of chordophones in Rio de Janeiro.

Keywords

Organology – Hornbostel-Sachs system – Luso-Brazilian plucked chordophones – *viola* – *violão* – Belchior Dias' guitar.

Resumo

Este artigo investiga a organologia da *viola* e do *violão* no Rio de Janeiro do século XIX discutindo dificuldades em traçar incontroversa história daqueles instrumentos e incertezas em relação às suas terminologias, morfologias e números de cordas. Mostra-se como a tradução em língua Portuguesa do sistema transcultural de classificação de instrumentos musicais Hornbostel-Sachs (1914), cria problemas para o estudo de instrumentos dedilhados no contexto luso-brasileiro. Este trabalho questiona, ainda, histórias canônicas sobre a guitarra na Europa mostrando que apesar de terem sido traçadas algumas linhas de descendência que explicam a gênese do instrumento moderno, a própria peculiaridade de tal tipo de cordofone dedilhado problematiza sua classificação por historiadores. O autor conclui o artigo propondo que se pode traçar um *continuum* entre a *viola* e o *violão* que encapsule os vários pontos de referência de diferença organológica entre a diversidade de cordofones no Rio de Janeiro.

Palavras-chave

Organologia – Sistema Hornbostel-Sachs – cordofones dedilhados luso-brasileiros – *viola* – *violão* – guitarra de Belchior Dias.

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INTRODUCTION

In this paper, I examine the classificatory organology of the *viola* ('five-course guitar') and the *violão* (six-course guitar) as well as debates and confusion around their terminology and morphology in nineteenth century Rio de Janeiro. In order to bring these terminologies to bear upon one another, it is necessary to compare these musical instruments according to their shape, number of strings, and size. I will then consider how these instruments have been classified in Europe and in Brazil, mainly in Portugal and Rio de Janeiro. I will establish certain parameters to distinguish for instance, a *viola* from a *viola francesa*, or a *guitarra* from a *violão*. The aim is not to generate a very detailed classification of those instruments, which would not be possible due to a lack of evidence remaining from the nineteenth century. Rather, I show that their terminology and morphology could have referred to a range of alternative chordophones depending on the geographical location and historical period in which the terms were used. I will highlight how these inconsistencies have arisen and consider the parameters of classificatory principles in this article.

In the first section I discuss the classificatory approach to organology in the works of Carole Sue DeVale (1990) and Margaret Kartomi (1990, 2001), confronting the problems of Hornbostel-Sachs (1914) system of cross-cultural classification of musical instruments in relation to the Luso-Brazilian chordophones. In the second section, I draw upon the history of the guitar in Europe and show that in spite of some lines of descent having been traced previously to explain the creation of the modern instrument, the very characteristics of guitar-like instruments make it difficult for historians to categorise those chordophones. In the third part, I look at some key Portuguese and Brazilian written sources in order to analyse the terminology used to refer to chordophones in general, and particularly the *viola* and the *violão* in nineteenth century Rio de Janeiro. I conclude by proposing that a continuum can be drawn between the *viola* and the *violão* which I suggest can encapsulate the various reference points of organological difference among the multitudes of chordophones in Rio.

CLASSIFICATORY ORGANOLGY

Sue Carole DeVale (1990) has proposed a three-dimensional model for organology based upon classificatory, analytic, and applied perspectives of musical instruments, or, as she prefers to call them, sound instruments. Despite splitting organology into three subareas she points out that they are intrinsically connected, one influencing and being influenced by the other two. When focusing exclusively on the classificatory aspect of the discipline, she argues that the systems of classification have drawn upon the flux of three continuums that underline their organisation. Firstly, there is a classificatory continuum that extends from a culture-specific to a cross-cultural di-



mention, in which instruments can be classified exclusively from within a localised geographical setting and/or include samples from a wider area of a village, to a city, country, continent, or across the world. A second classificatory continuum, she suggests, is related to types of instruments. This analytical rationale can range from interest in the properties of a singular instrument to a collection of instruments with similar characteristics, ultimately to analyse how all varieties of instruments come to be related to one another. The third criteria for classifying instruments is related to the origin of the classification and whether it is endogenous or created by a culture bearer and/or exogenous made by a non-culture bearer from where the system is created.

Taking the most accepted cross-cultural system of classification as an example, DeVale (1990) contends that the extent to which the Hornbostel-Sachs system (1914) incorporates the three continuums mentioned above is unclear. She argues that, while at first glance the H-S system could be considered exogenous for it is made by two European scholars who classify instruments from non-European cultures, on the other hand one should consider that Hornbostel and Sachs included in their classification instruments from their own European culture, which means that the system is endogenous as well. Another way to look at it is to consider Hornbostel and Sachs as organologists writing about musical instrument classifications pertaining to an international community to which they are members. In this case, their system might be deemed entirely endogenous. Yet, from another perspective, De Vale (1990) suggests one could see the H-S system as a secondary development from a previous Indian system¹ that classified musical instruments into four categories, which would render the H-S system an Oriental adaptation.

From a different perspective, Margaret Kartomi (1990, 2001) argues that the H-S model is an “observer-imposed” or “downward system” of classification in opposition to a “culture-emerging” or “upward system.” Comparing the H-S system with the upward system proposed by Elschek (1969), Kartomi (2001) explains that the difference in the systems is not just from the starting point of the analysis; the systems have clearly different aims. She contends, on the one hand, that the “micro-taxonomical” or upward system is used to investigate the small-scale of the instruments “and the analyst then proceeds to construct low to medium-level classifications of groups or variants of instruments” which tend to be affected by the social context of which they were part (Kartomi, 2001, p. 289). On the other hand, the downward or “macro-taxonomical” system enables a scholar to create a mode of organising, storing, and retrieving musical instruments not considering social and cultural factors. Kartomi (2001) contends that despite their individual imperfections, these methods can complement each other.

¹ Jairzbhoy (1990) contends that the Victor Mahillon system from which Hornbostel-Sachs created their system was based upon an Indian system from the beginning of the Christian era.



Whether one takes the continuum (flux) from the endogenous to the exogenous system of classification, as seen in the Hornbostel-Sachs as proposed by DeVale (1990), and the complementarity of the downward and upward systems as suggested by Kartomi (2001), it is possible to bring both approaches to articulate with one another. I argue that in historical research of chordophones for which remnants of few musical instruments of the period are available, the terminology is imprecise, the variability is enormous – that the H-S system provides a useful organological frame that complemented by an upward, in this case, endogenous classification, as the best way to come closer to a classification of the *viola* and the *violão* in nineteenth century Rio de Janeiro.

HORBOSTEL-SACHS SYSTEM IN PORTUGUESE

The Hornbostel-Sachs system was first published in Germany with the name *Systematik der Musikinstrumente: Ein Versuch* (Hornbostel and Sachs, 1914). The first translation into English was made by A. Baines and K. Wachsmann as “A Classification of Musical Instruments” (Hornbostel and Sachs, 1961). The system uses the physical characteristics of the production of sound as the basic principle of classification, dividing all musical instruments into four main categories: idiophones, membranophones, chordophones and aerophones. Two new categories were suggested later; the English author Francis Galpin created the electrophones’ category in 1937, and Dale Olsen added the chorpophone category in 1980². A new revision of the system was made by Jeremy Montagu (2009) and, with some alteration, became the standard for musical classification of instruments in European museums as proposed by the MIMO (Musical Instrument Museums Online) in 2011.³

The Hornbostel-Sachs scheme uses the Dewey decimal coding system to label instruments as they are classified by type, a system which is also used in libraries, and allows a database to expand as new items are included. The most relevant musical instrument category in this work is that of chordophones which receives the numeral ‘3’ in the system. Chordophones (3) can be subdivided into two main groups: simple chordophones (31), or composite chordophones (32). The category of composites chordophones (32) includes three different families of instruments: lutes (321), harps (322), and harp lutes (323).

The lutes (321) are subdivided into bow lutes (321.1), yoke lutes or lyres (321.2), and handle lutes (321.3). If one takes a five-course double strings guitar, known in the north of Portugal and Brazil as *viola* (fig.1); and a six-course single strings guitar, known in Brazil and in the north of Portugal as *violão* (fig.2), as examples,

² The references to the new categories of instruments are found in Kartomi 2001.

³ Revision of the Hornbostel-Sachs Classification of Musical Instruments by the MIMO Consortium, <http://network.icom.museum/cimcim/resources/classification-of-musical-instruments/>.



they would be classified as composite chordophones (32) from the lute family (321) in the group of the handle lutes (321.3) in the subgroup of the necked lutes (321.32), and further in the category of the necked box lutes or necked guitars (321.322).

Kartomi (2001) contends that the H-S system has the advantage of allowing a comparison of instruments, for the numbers associated with them and their categories situating them cross-culturally. Without entering into a deeper discussion of the endogenous classification of chordophones in Brazilian and Portuguese settings, but considering a translation of the H-S system into Portuguese, it becomes clear that the classification of the chordophones from both areas can be rather confusing. This remains so, in spite of the system's usefulness as a general comparative tool.

In the Portuguese context, the word *viola* can refer to a group of chordophones (321), a family of chordophones (321.3), and/or the actual instruments of either the five-course double strings guitar (the *viola*), and/or the six-course single strings guitar (the *violão*). Thus, in the Portuguese translation, Ernesto Veiga de Oliveira (2000, p.38), subdivided the composite chordophones (32) into *alaúdes* or *violas* (321), *harpas* (322), and *harpas-alaúdes* (323). The *alaúdes* or *violas* group (321) was then subdivided into: *violas de vara* (321.1), *violas de armação* or *liras* (321.2), and *violas de pau* or *de braço* (321.3). When one considers how the same *viola* and *violão* from the previous example would be classified according to the Portuguese version, it would appear that those instruments are also composite chordophones not from the lute family but rather (32) from the *alaúdes* or *violas* group (321) in the family of the *viola de pau* or *viola de braço* (321.3). In other words, the *viola* and the *violão* could both be classified as composite chordophones (32) of the '*viola*' group (321) in the '*viola*' family (321.3). I wish to draw attention to the fact that when I apply these characteristics to the *viola* and the *violão*, I am talking about the standardised models of those instruments, that, even nowadays, have variations, as I will show later in the paper.

One should bear in mind that the classification above was made by a Portuguese anthropologist who drew upon the H-S system from 'an observer-imposed, downward' perspective to classify popular Portuguese instruments. In contrast to this



Figure 1. *Viola*
Museu Histórico de Sorocaba (Valença, 1985, p.78)
Etnologia (Portugal)



Figure 2. *Violão*
Museu Nacional de
Inventory number:
BB.369



approach, in the third part of this work, I will illustrate how an upward perspective can problematise this classification of chordophones. A related issue that must be considered in the Brazilian setting is that a considerable number of representations, pictorial or written, were made by French, German, and English speakers who had a specific nomenclature for the instruments they registered in their own languages and traditions. Therefore, the generic use of the word *viola* can describe many instruments in the Portuguese language but it does not always make clear what kind of instrument was being described, which leads to misinterpretations of the types of instrument used in certain musical representations.

GUITAR IN EUROPE

Most histories of the guitar construct narratives that explain how the instrument evolved from the Renaissance to achieve its modern form. The iconic instrument is the six-course single string guitar made by the Spanish luthier Antonio de Torres Jurado (1817-1892) in the second half of the nineteenth century. Some see the 'guitar' as an even older instrument, finding its origins in Ancient times, and that it later joined the course of an evolutionary chain culminating in the classical form of the European instrument. Those histories about the 'guitar' reveal a great deal about the trajectory of the guitar-like chordophones and, in fact, they inform the coherent development of this widespread instrument that is called *violão* throughout Brazil, while in Portugal it is distinguished by region, being referred to as *violão* in the north, and *viola* in the south of the country.

However, the same authors (Tyler and Sparks, 2009; Grunfeld, 1969; Evans and Evans, 1977; Turnbull, 1974), who trace the evolution of the guitar, admit the interchangeability of terms for chordophones and the difficulty of establishing standards of shape, tuning, number of strings, terminology and musical practices related to them. Despite recognising the diversity of chordophones, they do not discuss a myriad of guitar-like chordophones which have their own particular trajectories and which are believed to be either underdeveloped instruments that were not included in the mainstream category of European chordophones, or they were transitory models of what would later become the guitar. One of the reasons for adopting a narrow approach is that the authors draw their histories mostly from a limited quality of historical sources, or interpret them merely to explain the existence of the current instrument.

130 It is a difficult task to determine the precise origins and development of the guitar in Europe. The reasons for this stem from the lack of precision in the term-



nology used in its denomination. For example, a type of chordophone could be identified by various names, or the same term could be applied to various kinds of instruments. Yet, chordophones with the same name are described differently by diverse authors, based not only on possible differences in criteria, but on the fact that each researcher had taken distinct examples corresponding to particular countries, or had interpreted the same sample in a different way (Evans and Evans, 1977; Oliveira, 2000; Turnbull, et al, 2015). In tracing the lineage of the guitar, Frederic V. Grunfeld (1969) acknowledges these uncertainties and explains that the terminology of musical instruments does not always follow their inherited shape. He argues that although the word guitar comes from the word cithara which was a kind of lyre, the morphology of the guitar comes from the ancient “lute or pandoura” (Grunfeld, 1969, p.33). The entry ‘cithara’ in the Oxford English dictionary, provides a clear explanation of the dynamics of the organology of musical instruments in general and the guitar:

Musical instruments are subject to great alteration of structure and shape, over time, and in different countries. Some of the resulting types become peculiar to one country, some to another. Consequently, cognate names, regularly descended from the same original, come at length to be applied by different nations to very different types of the instrument. Sometimes, also, one or more derivative types, distinguished by diminutive or augmentative names, are used in the same country. When, as often happens, any of these national or local forms of the instrument become subsequently known and introduced in another country, they usually take their local name with them. Hence, the modern languages often use two or three modifications of the same original word applied to as many instruments which different peoples have developed out of the original type. Thus cither, cithern or cittern, citole, gittern, guitar, zither, are all found in English as names of extant or obsolete instruments developed from the cithara.⁴

Even considering all the issues presented above concerning appropriation, transformation, migration and renaming of chordophones, Oliveira (2000) contends that there were two instruments known as guitars in Spain in the thirteenth and fourteenth centuries: the Moorish guitar and the Latin guitar. The Moorish guitar would resemble the form of the lute (piriform)⁵ while the Latin guitar would reflect the

⁴ Oxford English Dictionary Online, entry: “cithara, n.” (2014), According to Grunfeld (1969) this entry provides a good sum of the dynamics of musical instruments in history.

⁵ The form of the soundbox resembles the shape of a pear.



form of the classical guitar (eight-shaped).⁶ Gradually, during the fourteenth and fifteenth centuries, the term ‘Moorish’ and ‘Latin’ fell into disuse and the instruments of the European guitar family took on separate names according to country *guitarra* (Spain and Portugal), *guitarre* (France), *gittern* (Germany) and *chitarra* (Italy). However, Oliveira (2000) adds that during this period, the Spanish term *vihuela* and the Portuguese term *viola* were also used to name a great variety of chordophones; some played with bows others with plectrum or finger-style. The instruments had the same basic structure: a soundbox, a neck, and a tuning peg.

In spite of these difficulties in identifying precise types of *violas* from the Portuguese past, Oliveira (2000) argues that a guitar-like instrument named *viola*, similar to the Spanish and other European chordophones of the guitar family, are depicted iconographically and described in texts as early as the fifteenth century. Sparks (2009) contends that in spite of the interchangeability between the terms *guitarra* and *viola* in Portugal, the word *viola* “gradually usurped the meaning of *guitarra*... and by the mid-eighteenth century ‘*viola*’ had become the term preferred for several regional types of five-course guitar” (Sparks, 2009, p.196). A similar instance is pointed out by James Tyler (1980, p. 17) in the Italian context in the sixteenth century, where the “term *viola* was used as a generic name for any stringed instrument, but it was also sometimes used more specifically to mean a guitar-like instrument”.

However, in contrast to Oliveira (2000) and Grunfeld (1969), Tyler (1980) points out that before the sixteenth century, terms such as *guitarra*, *chitarra*, *guitarre*, etc., did not mean guitar, rather they referred to a small lute. He argues that despite some attempts to trace back the origins of the guitar, in pictures from medieval or even Ancient times, those representations do not offer consistent descriptions of what a guitar was supposed to be. For him the first true representation of a guitar-like instrument is found in the Italian painting of Sassetta⁷ “The Master of Vergil” from the early fifteenth century, in which one can clearly see a ‘figure-eight shaped instrument with the flat back and rather long and fretted neck.”(Tyler 1980, p. 15).

Nevertheless, this confusion for scholars over the terminologies of chordophones in Europe is reduced but not solved in the sixteenth century with the publication of three Spanish books that account for some chordophones that can be deemed precursors of the modern guitar (Turnbull, 1974). Tyler (2009) regards Luis de Narváez’s (1538) book, *Los seys libros del delphin*, as the oldest printed source on guitar history proving the existence of a four-course guitar. The other two books that discuss the development of the guitar are *Declaracion de Instrumentos Musicales*, by Juan Bermudo (1555, 1957); and *Orphenica Lyra* by Miguel

⁶ The form of the soundbox resembles the outline of the number 8.

⁷ Stefano di Giovanni was a Gothic-style painter considered to be the greatest Sienese painter of the early fifteenth century. <http://www.britannica.com>. Note that Sassetta is his nickname.



de Fuellana (1554). In the last two publications it becomes clear that there were at least three distinct guitar-like chordophones in the sixteenth century in Europe. They were the (six-course) vihuela, the four-course guitar, and the five-course guitar. Bermudo (1555, 1957) writes about different types of vihuelas with distinct textures and tunings, but all of them with six-courses and double strings. He also refers to the four-course guitar, as a shorter instrument than the vihuela although with a similar tuning, albeit excluding the first and sixth courses. Fuenllana (1554), in turn, considers the guitar with four courses to be not a different instrument but only a small vihuela, existing in many sizes.

From the late sixteenth to early eighteenth century, another instrument would become prominent in Europe, the five-course guitar, known as Spanish guitar or Baroque guitar (Tyler and Sparks 2009). The two oldest printed sources about the five-course guitar are the same books mentioned above. The Fuenllana's *Orphenica Lyra* (1554), refers to the five-course guitar as a normal vihuela (six-course) without the top string. Bermudo (1555, 1957) refers to the five-course guitar as a four-course one with an extra string on top. In spite of the controversy regarding the specification of these chordophones as to whether the Baroque guitar was a shorter vihuela or an expanded small guitar, the five-course instrument became more popular than the "vihuela, viola, four-course guitar, and even, to some extent, the lute" (Tyler 1980, p. 38). Further, regarding the five-course guitar, Tyler (2009) affirms that a large number of pieces of music were composed for this instrument for solos or accompaniment alike, and among them there are good quality and technically elaborated music. However, he contends one cannot be certain of the tuning standards and stringing preparation for this instrument according to the musical characteristics of that time.

The transition from the five-course to the six-course guitar occurred during the second half of the eighteenth century and the first decades of the nineteenth century. Changes in guitar form included moving from double to single strings, adopting modern tunings and modern techniques of construction. The rate of change varied across Europe, mainly in Spain, France, and Italy. Differences in instrument development in those countries was so accentuated that to perform an 'authentic' rendition of the written repertoire from 1750 to 1800 would require at least three specific guitars, or a focus only on the musics of one country (Tyler, 2009). This variety can be perceived by the acceptance of the six-course instrument in those countries. Whilst the guitar was the most popular chordophone in Spain as early as 1760; in France it was only accepted by 1808, "with the arrival in Paris of the Flamboyant Neapolitan Carulli," who brought a "new approach to guitar playing and manufacture...and the six-string guitar finally triumphed in the French capital" (Sparks, 2009, p. 248).



In the second half of the nineteenth century in Europe, the six-course single-stringed guitar was consolidated as the 'classical' guitar or, guitar, only. The instrument grew in size and reached its 'classical' form with new techniques of construction employed by the Spanish luthier Antonio de Torres Jurado (Henrique, 2002) (fig. 3). Despite Jurado's importance, it would not be right to give him the individual authorship of the guitar. Jurado's work represents the last step in a process that involved a transnational web of performers, composers, and luthiers, who constituted a kind of avant-garde of European professionals and who by sharing knowledge and aesthetic preference gradually 'moulded' many old guitars, across centuries, until the standardisation of the modern instrument. These developments are evident in the history of the guitar and subject to critical debate among scholars.⁸ However, one should not forget that the creation of the iconic guitar was part of a more complex relation of historical and cultural forces that in spite of the particular contribution of individuals included a great variety of chordophones and written, oral and aural musical traditions.



Figure 3. Guitar. Antônio de Torres Jurado - 1852 Musée de la musique (Paris). Inventory number: 2001.1.1

The six-string guitar was not simply named *guitarra* in Portugal for two reasons: Firstly, there had been a very popular eight-shaped plucked chordophone called *viola* in existence from at least the sixteenth century. Whilst *viola* was a generic term used to designate a myriad of chordophones, by the nineteenth century, it was more common in Portugal to name a guitar-like chordophone a *viola*. Secondly, in Portugal there was already an instrument called guitar or Portuguese guitar (*guitarra Portuguesa*) (fig. 4) that was a direct descendant of the English guitar (fig. 5), a pear-shaped, flat back, small, plucked chordophone taken there by English migrants (Morais and Nery, 2000). Thus, when the six-string guitar appeared in Portugal, it was recognised as a new type of *viola*, being a completely different instrument from either the English-derived guitar or the local chordophones, in terms of its size, number and types of strings and musical use. This six-string guitar was brought to Portugal from Paris which was a great producer of guitars in the nineteenth century (Sparks, 2009) and it became known as the French *viola*. Being bigger than the traditional Portuguese violas, it was also called *violão*, (literally, large *viola*). Thus, what became known as the guitar, (or variants of this word in many European languages), was variously called *viola francesa*, *viola* or *violão* in nineteenth century Portugal.

⁸ See Tyler (1980); Tyler and Sparks (2009), Evans and Evans (1977), Turnbull (1978), and Grunfeld (1969).



SOURCES FOR VIOLAS IN PORTUGAL

Two documents from the sixteenth and eighteenth centuries attest to the existence of violas with similar attributes as mentioned by Oliveira (2000), a round sound-hole, tall box without accentuated incurved sides, median neck, fretboard on the level of the top soundboard, drawn rosette, strings attached under a narrow bridge glued on the top board, and the pegbox slightly inflected backwards. They are the *Regimento dos violeiros of Lisboa* (regulation of the viola makers of Lisbon) from 1572 (Correia, 1926) and the *Regimento dos violeiros of Guimarães* (regulation of the viola makers of Guimarães)⁹ from 1719 (Caldas, 1881). In Portugal, the term *violeiro* can reference either the *viola* maker or the *viola* player. Those regulations prescribed techniques to build *violas*, controlling the types of woods, the specific dimensions of the instruments, the apprenticeship of the trade, and in some cases the prices they should be sold for.

In the Lisbon regulation of *violeiros* from 1572, one sees that the professionals made bowed viols, harps and different sizes of guitar-like *violas*. It was common for the *violeiro* or luthier to make many kinds of musical instruments at that time. Specialisation in making only one instrument was a later phenomenon according to Michel'Angelo Lambertini (1914) who mentions that even the famous Italian luthier Antonio Stradivarius (1644-1737) used to make many instruments, including guitars. However, the only chordophone remaining from this period is the 1581 Belchior Dias' five-course viola (or guitar) held in museum of the Royal College of Music in London. According to Turnbull (1974, p.10), the construction of this instrument conformed to the Regulation's recommendations insofar as "the neck ends in a fork and extends into the sound box, where its top is fixed to the soundboard and its bottom to the back of the sound box." Tyler (2009) and Evans and Evans (1977) also agree that regardless of later refurbishments, the *viola* continued to follow the general style of the instrument construction in the sixteenth century.



Figure 4. *Guitarra Portuguesa* (Portuguese guitar) Museu da música (Lisbon)



Figure 5. English guitar (1812) Museu da música (Lisbon).

⁹ Guimarães is a northern Portuguese city.



My examination of Belchior Dias' *viola* in the museum of music in the Royal College of music in London in 2013 (figs. 6, 7, 8, 9) (donation collection 1894, RCM 171), confirms the features described by Turnbull (1974), Tyler (2009), and Evans and Evans (1977) regarding the technique used in the construction (according to the regulation of viola makers of Lisbon) and the replacement of the soundboard top, that despite clearly used looks newer than the rest of the instrument. However, apart from the importance of inspecting it closely, and holding the instrument to feel its weight, shape and size, the reference text for the chordophone in the museum displays information that is useful for understanding the organology of the *violas*. The text (without author's name) reads:

Belchior Dias, Lisbon, 1581 (Guitar or Vihuela)

...This instrument is considered by many to be the earliest surviving five-course guitar. However, it dates from the period when the vihuela and the guitar co-existed and, if the eleventh role in the peg head is original, the instrument could be a six-course, eleven string *vihuela*. In either case, the construction of the corrugated back demonstrates considerable skill by the workshop that produced the instrument, since the staves are curved in two directions.

Indeed, as I show in figure 9, there is an extra hole on the peg head of Belchior's *viola*. In contrast to what the text suggests, it is for this reason that the instrument could be a vihuela instead of a guitar (*viola*). I argue that whether the instrument can be called *viola* or *vihuela* is not the most important outcome of this design. What seems significant to point out is the 'flexibility' of the chordophone. Yet, it is worth noting that having an extra hole does not mean that it could only be strung with five or six courses, in fact the extra hole could be used for making one of the courses tripled, 'transforming' the guitar, *viola* or *vihuela*, into a five-course instrument comprising four double courses and one tripled course. Besides that, whether the role was made after its fabrication in 1581 does not change the feature of the instrument that allowed many modes of stringing.



Figure 6. Belchior Dias' Viola, 1581, as it is displayed in the museum.
Royal Music College
London
Picture: Renato Castro



Figure 7. Belchior Dias' Viola, 1581, full body.
Royal Music College
London Picture:
Renato Castro



Figure 8. Belchior Dias' Viola, 1581, label.
Royal Music College London Picture: Renato Castro



Figure 9. Belchior Dias' Viola, 1581, 11th hole on the pegbox.
Royal Music College London
Picture: Renato Castro

In the *regulation of the Violeiros of Guimarães* from 1719, for instance, one finds many sizes of *violas*. The list in which the *violas* are shown places them in relation to their price. The information is organised in descending order from bigger, more



expensive instruments to smaller, less expensive ones. The variety of *violas* for sale starts from the “*violla de marca grande*,” (big viola), followed by the “*mea violla de contrabordão*,” (half violas at variance with bourdons), and then cheaper “*viollas que chamam segundas*” (violas called the seconds). The price list continues, with a high treble *viola* called *machinho*, which is split into three types: “*Machinhos de cinco cordas*,” (five-string *machinho*) “*Machinhos de coatro cordas*,” (four-string *machinho*) and a “*mais pequeno machinho* (even smaller *machinho*)” (Caldas, 1881, p.111). It is important to highlight that to receive the recognition of artisan it was necessary to follow the regulations’ recommendations. In parallel with this regulated activity, the *violeiros* could also design and make their own *violas* independently of master craftsman standards. Yet, other unqualified instrument-makers who were not registered with the regulations could do the same and create as many types of *violas* as they wished. Michel’Angelo Lambertini’s (1914) survey of the musical instrument industry in Portugal found a considerable number of *violeiros* and *guitarreiros* (what for the author was interchangeable terms for *guitarra* or *viola* makers) working in that country from the sixteenth century to the twentieth century. However he does not specify the kinds of instruments they made.

Other important series of documents showing the popularity of the five-course *viola* in Portugal are some codices and publications for *viola* and other chordophones found in Portuguese archives. Rogério Budasz (2001) analysed three of them: the Coimbra codex, the Gulbenkian codex, and the Conde de Redondo codex. Those codices have no clear date of publication, but the watermarks indicate that they were written in the seventeenth and eighteenth centuries. The codices encompass only solo music, and besides the *viola* include music for “*bandurra de cinco* (five-course *bandurra*),” “*rebeca de quatro* (most likely violin),” and “*cravo* (harpsichord)” (Budasz, 2001, p. 75-76). The repertoire contains Iberian, French, Italian, African and Afro-Brazilian dance forms, encompassing aristocratic genres such as the minuet, and more popular ones such as the “*amorosa, arromba, cãozinho, cubanco, cumbé, gandum, oitavado, marinheira, paracumbe, and sarambeque*” (Budasz, 2001, p. 135). The *viola* in these codices seems to mediate many musical practices and influences in Portugal. Budasz (2001) contends that the kind of notation used, mainly tablature and cipher, virtually without indication of rhythm, can be understood as a repertoire in the middle of a written and an oral musical tradition.

Perhaps the most significant document about the five-course *viola* in Portugal is a *viola* tutor issued in the city of Coimbra in 1789. The long title of the book is already informative about the content, but its importance deserves more detailed examination, as follows: “*New Art of the Viola; that teaches you how to play with foundation and without a master, divided into two parts, a speculative and a practical one; with prints, natural and accidental signs, and some Minuets and Modinhas in scores and*



ciphers. Work useful to all kinds of people, mostly to those that follow the literary life, and even the ladies."¹⁰ Its author, Manoel da Paixão Ribeiro, was a dilettante musician and Professor at the University of Coimbra, where he taught Latin grammar, reading, writing, and maths. His strong desire to learn to play the viola, and a lack of teachers for the instrument motivated him to learn by himself. To create his method, Ribeiro resorted to the formal musical knowledge available at the time and to his observations of the widespread *viola*-playing tradition in the country. For the formal aspects he studied the Parisian Encyclopedia, the Dictionary of Mr. Rousseau and the elements of music of Mr. Rameau (Ribeiro, 1798).¹¹ However, he admitted that the theoretical knowledge consulted was not enough for him to play the wide range of styles he desired. Ribeiro acknowledges that he had to observe the *viola* players in their everyday performances to grasp aspects of the instrument not found in books. For this, he attended as many performances as possible and exchanged information with some friends who were dilettante musicians like himself.

Ribeiro explains that the theoretical and practical knowledge he gathered was meant to be a self-reference guide, but once people started hearing his expertise on the *viola*, they also wanted private lessons from him. Once he did not have time for this job he decided to publish a *viola* tutor to bridge the oral and written musical tradition. Some of the most important information he recorded was how to string the *viola*. He advised the reader how to choose strings, describing differences between metallic and gut strings, and between real and false ones. These details were crucial in order to 'dignify' the instrument. A very well strung and tuned *viola*, says Ribeiro "would reasonably sound like a harpsichord" (Ribeiro, 1789, p. 7). This is particularly important information since one of the main issues about the *violas* is their variety.

SOURCES FOR VIOLAS IN BRAZIL

Violas have been recorded in Brazil since the beginning of the sixteenth century when the Jesuits used the instrument in the catechisation of the native population in rural regions of the country (Castagna, 1999) until the nineteenth century, when it expanded into urban areas, such as the city of Rio de Janeiro (Taborda, 2011). Much of the organological knowledge about the Brazilian instrument came from Portugal when *violas* were imported to the country but there are no records akin to the Portuguese regulation of the *violeiros*. Thus, the morphology of the *viola* in Brazil in the first centuries of colonisation is practically unknown; some exceptions are of images found in travel literature, produced mostly by foreigners who were not always acquainted with the local culture and music.

¹⁰ My translation into English.

¹¹ Despite Ribeiro has admittedly used the references mentioned above, he did not include a bibliographical section in his tutor.



One record that mentions the *violas* and testifies to their variety in Brazil is a document from customs in the port of Santos (São Paulo State), which registered the arrival of two specific *violas* in the country in 1739: small *violas* and common *violas*, alongside the importations of strings for the instrument. Another record shows that no less than 1,123 *violas* and 389 small *violas*, alongside rabecas (fiddles) and a rabecão (cello) arrived from Portugal at the port of Maranhão province in 1796.¹² When one compares the importation of instruments with the regulation of the *violeiros* in Portugal one sees that at least two types of *violas* existed in Brazil and Portugal in the eighteenth century, a ‘small *viola*’ and a ‘common *viola*.’ Whether these instruments are *violas* with the same general characteristics differing only in size, or whether they are five-course *violas* or smaller *violas* such as a cavaquinho or a machete (types of treble *violas*) is difficult to say by this account.

Violas, guitarras, cítaras, and harps were used in São Paulo according to a series of inventories and wills from 1604 to 1700.¹³ Again the *viola* has been documented in the country and, it is important to note that it was recorded alongside the *guitarras*, *cítaras* and harps. To find *violas* and *guitarras* being mentioned in the same list is intriguing for two reasons. First, as I have argued at the beginning of this study, the term *guitarra* and *viola* could have been used interchangeably in Portugal in the fifteenth century but, according to Oliveira (2000) and Sparks (2009), the term *viola* was used synonymously with that of the guitar in other European countries. It is common to find these two instruments being mentioned together in journals, travelogues and fictional literature from the nineteenth century. As there is no definitive description of the *guitarra*, its use is open to speculation. It may have been the case that together the terms referred to a kind of stereotyped guitar-like chordophone, or perhaps they were recognisably distinct instruments that were named differently. It is important to acknowledge that many other chordophones existed in the country and that in Brazil they had a local terminology (Castro, 2014).

Another important document (recently found) about the *violas* in Brazil is the inventory process (1771-1777) of the deceased Portuguese *violeiro* (*viola* maker) Domingos Ferreira (1709-1771) who lived in Minas Gerais in the eighteenth century. The document attests to the production of many types of *violas* in Brazil and the difficulty one has to be sure about the specific organological features of the chordophones accounted for. The production included: ordinary *violas*, big *violas*, half *violas*, big and small *descantes*, and big and small *machinhos* (Castagna, Souza, and Pereira, 2012).

¹² *Documentos interessantes para a história e costumes de S. Paulo* vol. 45 (1924), 168. Quoted by Paulo Castagna, “Fontes bibliográficas para o estudo da prática musical no Brasil nos séculos XVI e XVII” (M.A. thesis, University of São Paulo, 1991), 671. Cited in Budasz (2001, p. 24).

¹³ Paulo Castagna, *O estilo antigo na prática musical paulista e mineira nos séculos XVIII e XIX* (Ph.D. diss. University of São Paulo, 2000), vol. 1, 215. Cited in Budasz (2001, p. 25).



In order to recover a history of the *viola* in Rio de Janeiro, it is necessary to refer to periodicals that comprise part of the written accounts of the instrument. Many chordophones, including the *viola*, the *viola francesa* and the *violão*, are found in the *Almanak Administrativo, Mercantil e Industrial do Rio de Janeiro* (Administrative, Mercantile and Industrial Almanac of Rio de Janeiro) known generically as the *Almanak Laemmert*. The almanac was an annual periodical that included public and private information about the commercial, administrative, political and economic aspects of the capital, and later, of other provinces in Brazil. It was first published in 1844, and the last issue I had access to was from 1910.¹⁴ It is revealing to see how the advertisements of music teachers, performers, music stores, and instrument makers, from the first half of the nineteenth century until the beginning of the twentieth century, recorded musical aspects in the city. The almanac does not include references to shapes of the instruments. Announcements about teachers, traders, and performers, give a sense of the terminology and types of instruments played in Rio.

The advertisements of *violeiros* (*viola* makers) date from 1845 to 1910, but until 1900 there is no mention of the types of chordophones produced. Only from 1900 onwards does one find certain kinds of chordophones being made. In 1900, there were six makers of *violas*, *violões*, *citharas*, *rabecas* and other stringed instruments; in 1910, the number increased to eight makers of the same types of instruments. Despite the number of *violeiros* registered in this period, no teachers of five-course *violas* are mentioned. This omission can be interpreted in different ways: firstly, it could be seen as a characteristic of the *viola* as an aural and oral popular instrument used to accompany singing, which would not necessarily require teachers for the instrument; secondly, by the time the almanac was being published, the *viola* was not the popular instrument that it used to be, and the *violão* had already been fully adopted, at least amongst the potential readers of the almanac, the middle and higher classes in Rio de Janeiro.

Nevertheless, one can find *violão* teachers in the almanac every year from 1847 to 1889. In two issues only, teachers of a 'different kind' of *violão* are mentioned: Luiz Vento in 1849 who tutors pupils on the "violão francez;" (Vento, 1849, p.273), and José Joaquim dos Reis in 1866 who taught "violão" and "guitarre franceza" (Reis, 1866, p. 465). It is intriguing that the second teacher, Reis, announced that he taught both *violão* and French guitar, which was arguably the same instrument, the first being somewhat larger than its counterpart. It can be an indication that the term *violão* that denominates the six-course single strings guitar was not totally consolidated and the terms, French *viola* or French guitar, could be preferred by

¹⁴ The Almanac was accessed on the website: www.crl.edu/brazil/almanak in (2013). However, it only displays the editions from 1844 to 1889, the other numbers were accessed in the 'Real Gabinete Português de Leitura', in Rio de Janeiro.



some people. It is interesting to understand the endogenous classification of chordophones in Rio, the combination of the French word *guitarre*, with the Portuguese term *franceza*, resulting in “guitarre franceza.” The use of these words is symptomatic of French cultural influences upon Rio de Janeiro in the nineteenth century.

Seven stores advertised musical instruments in the 1844 edition of the almanac. They announced pianos, wind, and stringed instruments but did not give details about the instruments. In the advertisement of João Bartholomeu Klier’s one reads: “music teacher has the biggest music establishment, instruments from the best factories in Germany and France, and all articles concerning this art” (Klier, 1845, p.256).¹⁵ The advertisement invites speculation around the trade of French *violas* or French guitars in this store. Cellos, and *violões*, are also announced in the music stores’ sections of the 1854, 1855, and 1856 editions. By 1877, fiddles, *cavaquinhos*, cellos, *violões*, bowed bass, *guitarras* and *violas* are mentioned in João dos Santos Couceiro’s advert. The same seller added *bandolins* (mandolin) and *bandurras* (bandora) to the previous list of *cavaquinhos*, *violões*, *violas*, and *guitarras* in 1882. In 1900, he announced *citharas* (cittern), as well.

Before the publication of the almanac other periodicals accounted for chordophones called *viola Francesa* and *violão* in Rio. The first reference to the *viola francesa* in Rio de Janeiro was an advertisement in the periodical *O Spectador Brasileiro: diário político literário e comercial* from 1826 in which the Italian Bartolomeo Bortolazzi (1773-?)¹⁶ wrote: “Music teacher, resident at 80 Inválidos Street, informs the respectable public that he teaches whoever wants to learn music, to sing, to play the viola, viola francesa, or mandolin” (Bortolazzi, 1826, cited in Taborda, 2011, p. 72). It is important to note that the teacher distinguished three chordophones; the *viola*, the *viola francesa* (French *viola*), and the *mandolino* (mandolin). Besides being the oldest known reference to the *violão* prototype in Rio de Janeiro, this notice is the first to offer *viola* classes as well.

In another advertisement from 1827, Bortolazzi announced one of his compositions: “In 207 Rosário Street one can buy a theme with six variations for flute and piano forte or French viola accompaniment ad libitum, composed by the music teacher Bartolomeo Bortolazzi employee of the Imperial theatre” (Bortolazzi, 1827, cited in Taborda, 2011, p. 72-73).¹⁷ It should be observed that the accompaniment for the theme on sale is suggested to be played on the piano or the French *viola*, but not the *viola*. The composer, who was a teacher of the *viola* and the *violão* did not consider the *viola* a suitable instrument for that music. One can speculate about the reasons for not including the *viola* in the advertisement, it could either be related

¹⁵ My translation from Portuguese

¹⁶ A short profile of Bartolomeo Bortolazzi including his musical trajectory is available on (<http://www.justclassicalguitar.com/en/guitar-history/nineteenth-century/list/bartolomeo-bortolazzi/>).

¹⁷ My translation from Portuguese.



to the timbre or capacity of the instrument, or it could indicate the social status of the *viola* in relation to the piano and the *violão*.

CONCLUSION

This paper has demonstrated three points regarding the organology of the *violas*. First, it showed how a downward or exogenous system of classification of musical instruments, such as the Hornbostel-Sachs system (1914) can be confusing when applied to classify plucked chordophones such as the Portuguese and Brazilian *violas* and *violões*, for these instruments have their own local (endogenous) terminologies. Secondly, the article indicated how the history of the guitar in Europe has always been surrounded by many chordophones with different morphologies and terminologies, and that the progression that led to the creation of the Jurado's guitar was one of many other plucked chordophones' histories that have their own distinctive trajectory. As I have shown, one clear example of the variability of chordophones in Portugal, for instance, is the Belchior Dias instrument from 1581, which displays the possibility of alternative stringing and to which the term guitar, viola, or vihuela can be applied. Thirdly, I argued that the uncertainty of *viola* classification found in Europe and especially in the Portuguese context is reflected in the ambiguities surrounding the organology of *violas*, *violões*, and *guitarras* in Rio de Janeiro in the nineteenth century.

However, I contend that in spite of uncertainties about the chordophones discussed here, it is possible to identify some characteristics on the *viola* and the *violão* that, once fixed, serve as an auxiliary reference to reduce ambiguities over the representation of these instruments in historical accounts. I have suggested that it is beneficial to create an artificial continuum along which many plucked chordophones can be placed and to categorise them in relation to the *viola* and *violão* standards. My criteria of which elements of the *viola* and the *violão* should be chosen for this purpose is related to how these instruments came to be known in the twenty-first century. However, I am not suggesting that there is only one type of *viola* and one type of *violão* in Brazil. It is clear that one can find a great variety of *violas* and *violões* in Rio de Janeiro and in Brazil nowadays. Music catalogues offer hundreds of options, and in many cultural and geographical regions luthiers and artisans still construct prototypical instruments, or produce *violas* and *violões* on demand for customers. This means that the *violas* and the *violões* today can be many sizes and formats, the number and types of strings vary, and, along with the quality of wood use and instruments, they can be acoustic, electric or electro-acoustic. Yet, they are identifiably different instruments.



| Viola ← | → Violão |
|----------------------------------------------------|--------------------------------------------------|
| Five courses | Six courses |
| Double strings | Single strings |
| Metallic strings | Non-mettalic strings |
| Eight-shaped resonance box smaller than the violão | Eight-shaped resonance box bigger than the viola |
| Scale shorter and narrower than the violão | Scale larger and wider than the viola |

Table 1.

Once one includes the instruments found in the historical sources found in Brazil and in Rio de Janeiro mentioned above, their classification would be as shown in the following continuum.

| Viola ← | → Violão |
|----------------------------------------------------------------------------------|--------------------------------------------------------|
| Violas and Guitarras - São Paulo (1604 to 1700) | Viola francesa - teacher, newspaper (1826) |
| Small violas and common violas - Santos port (1739) | Violão - musical score, newspaper (1827) |
| Ordinary violas, big violas, half violas - inventory in Minas Gerais (1771-1777) | Violão Francez - teacher, almanac Laemmert (1849) |
| Violas and small violas - Maranhão port (1793) | Guitarre franceza - teacher, almanac Laemmert (1866) |
| Viola - teacher, newspaper (1826) | Guitarras and violões - store, almanac Laemmert (1877) |
| Violas - store, almanac Laemmert (1877) | |

Table 2.



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