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**LEARNING ITINERARIES & TRANSNATIONAL RELATIONS  
INITIATING THE HOT CLUBE DE PORTUGAL’S JAZZ SCHOOL**

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***Abstract:** The jazz field in Portugal was marked by an event with wide implications during the turn to the 1980’s: the creation of the Hot Clube de Portugal’s School of Jazz. Through the activity of this school, it was established an autonomous form of jazz teaching, provided with its own curricular programs, teachers and with learning methods based on concepts and values which the agents held as being representative of this musical expression. The intent of this paper is to analyse the ways in which the mobility of musicians (and other agents) and their interactions in a variety of situations contributed the development of jazz education models in Portugal, specifically in the case of Hot Clube de Portugal’s School of Jazz. It will be considered the interactions between agents with different geographical backgrounds, the contact among institutions and the circulation of products related to jazz.*

***Keywords:** jazz, Hot Clube de Portugal, jazz education*

## 1. INTRODUCTION

During the first half of the 20<sup>th</sup> century, more accurately in the 1930’s and 1940’s, jazz enthusiasts in Europe and U.S.A. started to organize themselves in order to share some records and to promote that musical expression. The hot clubs were an example of this kind of organizations, where enthusiasts could build networks to share and produce jazz records, and to organize concerts and jam-sessions (Lopes, 2004: 164). In the European context, hot clubs were created in countries such as Spain, France or Belgium. Also the jazz enthusiasts in Portugal followed the trend which was taking place in other European countries and started with its own associations. Hot Clube de Portugal (HCP) - which is still active currently - was founded in the turn to the 1950’s under the influence of institutions such as Hot Clube de France (Curvelo, 2010). Luís Villas-Boas, its main founder, was also an important jazz promoter, responsible for the broadcasting of jazz contents and, later, for the organization of several jazz concerts and festivals. The creation of HCP is a landmark for a new kind of jazz perception in Portugal: jazz was no longer just a repertory or a set of stylistic characteristics

of the music played in the night clubs for dancers; jazz was starting to be perceived as a musical universe with its own history and tradition, and as an autonomous practice in relation to both popular music and European art music (DeVeaux, 1991). In addition to Hot Clube de Portugal, there were some more attempts to create jazz clubs in Portugal, as was the case of Clube Universitário de Jazz (1958/1961), a Lisbon based club founded by the jazz promoter Raul Calado (Félix, 2010). In the broadcasting scenario, jazz acquired a place of its own. In the radio, programs such as *Hot Club* (Emissora Nacional, 1945, presented by Luís Villas-Boas), *Cinco Minutos de Jazz* (Rádio Renascença, 1966, José Duarte) or *Tempo de Jazz* (Emissora Nacional, 1958, Raúl Calado) were examples of spaces specifically dedicated to jazz contents; *TVJazz*, presented in the 1960’s by Manuel Jorge Veloso, was an example, among others, of the space granted to this music in the TV schedule. Also the emergence of jazz festivals, mainly since the 1970’s, generated important contexts to the musician’s performances (Veloso *et al.*, 2010). These elements, among other institutions, events and individuals, were providing the basis, in the Portuguese context, to what Paul Lopes – following the work of Howard Becker

(1982) – calls a “jazz art world”. Focusing the case of U.S.A., Lopes describes this jazz art world as the “magazines, records, books, clubs and concerts developed to support this music”, providing “the organization, production, criticism and audiences to make jazz a distinct genre and specialized market” (Lopes, 2004: 4). Also the jazz teaching would guarantee a space specifically conceived to grant musicians some knowledge and experience about this musical expression. In the late 1970’s, doublebass player Zé Eduardo became involved with the idea of developing a school specifically dedicated to jazz teaching. Eduardo’s project would become part of HCP’s activities: after a first attempt in 1977, which would last for three months, Hot Clube de Portugal’s School of Jazz begun its activity in 1980 with the financial support of a governmental institution – Secretaria de Estado da Cultura (Culture State Secretary)<sup>1</sup>. With this project, it was established a platform specifically dedicated to jazz teaching, provided with its own teachers and curricular structure.

This article intends to explore the way in which Hot Clube de Portugal’s School of Jazz was developed under the influence of the jazz teaching practices and institutions abroad, mainly through products and individuals who became related with the school activities. The analysis will be focused on three topics: the use of pedagogical materials such as instructional books; foreign teachers who arrived at the school with formal training in music education institutions; and HCP’s students who started to go abroad to deepen their studies and then came back working as jazz teachers in Portugal.

## 2. PEDAGOGICAL MATERIALS: INSTRUCTIONAL BOOKS AS A BASIC TOOL TO JAZZ TEACHING DEVELOPMENT

In 1977, Zé Eduardo created a big band composed by young musicians which were, in their majority, conservatory music students interested in playing jazz. Orquestra Girassol, the group’s name, was, according to Eduardo’s version, an experiment based in his desire to make a jazz big band where he could try to apply the notions and techniques which he was studying from the books of authors such as William Russo<sup>2</sup>. To the other musicians in the band, Orquestra Girassol also

worked as a place where they could learn some techniques and harmonic concepts about jazz. Luís Caldeira, one of the saxophone players in the band, reminds that “Orquestra Girassol was an ensemble where people could learn something, [...] the idea was to learn how to play in a group”<sup>3</sup>. Zé Eduardo started to assume the role of a pedagogical leader to the other musicians. Trumpet player Tomás Pimentel tells that Zé Eduardo “always felt the need to have a pedagogical action and to make people evolve in the jazz language”<sup>4</sup>. Besides having a special interest in pedagogical issues, Zé Eduardo also had an important point which contributed to the development of his pedagogical capacities: the contact with jazz instructional books which guided his own study. As a regular reader of the jazz periodical *Downbeat*, Eduardo started to purchase some jazz instructional books that were announced in its pages. Those books included the methods of authors such as Jamey Aebersold, David Baker or William Russo, consisting in guidelines for the jazz students with scales and arpeggios exercises, harmonic concepts, stylistic considerations and repertory analysis, among other things. Eduardo reminds that he started to study with these books in a period in which they were very rare in Portugal<sup>5</sup>. With those materials, Zé Eduardo made contact with organized and structured methods for jazz study, having an order “in which the components of a musical system are learned” as described by Bruno Nettl (1995: 49).

But these instructional books had a wider effect in the development of the jazz teaching in Portugal. Since he was the pedagogical mentor of Hot Clube de Portugal’s School of Jazz, Zé Eduardo developed the learning contents to be applied in its activities. Eduardo explains that he “took all the American methods which were useful, namely the play-along methods from Jamey Aebersold [...] and also methods from David Baker and from other authors linked to the universities [in the U.S.A.]”<sup>6</sup>. By searching in the school documents and in the notes made by Zé Eduardo, it is possible to find several references to this authors and methods<sup>7</sup>. In this case, the

<sup>1</sup> “Escola de jazz no hot clube: 1º período termina sem chumbos” in *SE7E*, 20/05/1980; “Escola de jazz do Hot Club: experiência solidamente inovadora substitui-se ao nacional auto-didatismo” in *Portugal Hoje*, 29/03/1981.

<sup>2</sup> Interview with Zé Eduardo conducted by the INET-md researchers Miguel Lourenço and Pedro Roxo (Faro, 25/07/2013).

<sup>3</sup> Interview with Luís Caldeira conducted by Pedro Mendes (Lisbon, 09/03/2015).

<sup>4</sup> Interview with Tomás Pimentel conducted by Pedro Mendes (Lisbon, 18/07/2013).

<sup>5</sup> Interview with Zé Eduardo conducted by the INET-md researchers Miguel Lourenço and Pedro Roxo (Faro, 25/07/2013).

<sup>6</sup> Interview with Zé Eduardo conducted by the INET-md researchers Miguel Lourenço and Pedro Roxo (Faro, 25/07/2013).

<sup>7</sup> This documentation is available in Hot Clube de Portugal’s archives (Zé Eduardo’s collection).

circulation of products such as magazines and books about jazz had a significant influence in the development of Hot Clube de Portugal's School of Jazz and, consequently, in the development of jazz teaching in Portugal: the instructional books were an important reference when Zé Eduardo was structuring the school learning contents.

### 3. THE EXPERIENCE OF FOREIGN TEACHERS

In 1980, when Hot Clube de Portugal's School of Jazz launched its activities with public financial support, the president of HCP at that time, Rui Martins, asked the British organization Jazz Center Society for some support to the school activities, requesting some experienced teachers who could help in a first phase. HCP received the visit of three teachers recommended by the Jazz Center Society: Michael Garrick, Don Rendell and Tony Faulkner. Zé Eduardo, talking about the presence of these three teachers, stressed that "Portuguese jazz musicians could finally understand that the only reason why foreign musicians were better than them was due to fact that they work hard and with method"<sup>8</sup>. Working with method was, according to Eduardo, an element which was missing in the Portuguese musicians, and people such as Garrick, Rendell and Faulkner were important to show that.

In the school activities it was always important to have a teacher who could think and apply a curricular program. Zé Eduardo was the first person doing that, supporting himself in the instructional books, which were important to guide his own study, and in the experience he acquired as a leader of groups such as Orquestra Girassol or Araripa<sup>9</sup>. After the departure of Zé Eduardo to Barcelona in 1982, where he worked as director in the Taller de Musics' School of Music, another musician arrived at Lisbon to become in charge of HCP's School of Jazz: the doublebass player David Gausden, who came with formal jazz instruction acquired in U.S.A.. Rui Martins claims that Gausden had a huge importance by "working on the pedagogical structure of the school [...], with the influence of the jazz educational system in U.S.A.". The knowledge held by Gausden and his attitude as the pedagogical responsible for the school, turned him into "an

important reference to young musicians [that were studying at HCP] at that time"<sup>10</sup>.

Another foreign musician important in the initial development of a formal jazz teaching in Portugal was the North American Mike Ross, also a doublebass player. Ross had in its curriculum the musical studies in North Texas State University and his work as a member of Stan Kenton's orchestra. It was already stated, in the beginning of this text, that there was a first attempt to establish a jazz school in HCP which lasted for three months in 1977. One of the school teachers during those three months was precisely Mike Ross. After that period, the school stopped its activity, and Luis Villas-Boas decided to create his own jazz school at Luisiana, a club of his own, inviting Ross to be the teacher responsible for all lessons. Some young musicians attended the lessons at Luisiana, but the school (and also the club) was closed few time later.

Although the short term of these two projects, Mike Ross was still recognized as an important mentor by the young jazz students who worked with him. As an example, bass player Fernando Júdice da Costa, referring the times when he was starting to play jazz in the 1970's, states that "sometimes we needed to understand things that were not clear for us, like harmony concepts and other stuff, and when Mike Ross arrived, he was disclosing everything"<sup>11</sup>.

Musicians like Ross, Gausden, Garrick, Rendell and Faulkner arrived at Portugal in a period when the materials about jazz were still scarce. The fact that Zé Eduardo had access to jazz instructional books was an exception among the other musicians. It wasn't easy even to find musicians with a systematical knowledge about jazz, who could assume the role of teaching in a jazz school. When those foreign musicians came to Lisbon, they were among the few ones who had that kind of systematical knowledge about jazz. Following that, it is not difficult to understand that they easily acquired some prominence among the younger musicians who were looking to improve their jazz skills. They brought their own experience, acquired, in much cases, in the jazz educational institutions, using it to contribute to the establishment of a formal jazz teaching in Portugal; also through them, the jazz educational system that was already developed in U.S.A. and in some European countries extended its influence to the Portuguese context, since they were people who, more or less directly, had some kind of connection with that system.

<sup>8</sup> <sup>8</sup> "Escola de jazz no hot clube: 1º período termina sem chumbos" in *SE7E*, 20/05/1980

<sup>9</sup> Araripa was an important group in the Portuguese jazz scene, active between 1975 and 1977, constituted by Zé Eduardo (doublebass), Emílio Robalo (piano) and João Heitor (drums).

<sup>10</sup> Interview with Rui Martins conducted by M. Lourenço, P. Mendes and P. Roxo (Lisbon, 04/12/2014).

<sup>11</sup> Interview with Fernando Júdice da Costa conducted by Pedro Mendes (Lisbon, 04/02/2015).

#### 4. HCP' STUDENTS GOING ABROAD AND COMING BACK

During his years as the pedagogical director in Hot Clube de Portugal's School of Jazz, one of David Gausden's struggles was to convince his students to deepen their jazz studies and experience going to U.S.A., Rui Martins tells that

David [Gausden] was insisting with the young students, telling them to go to New York. [...] He was arguing that they could not restrict themselves to the local standards, they had to compare themselves with the international levels, and New York was a place of high standards for jazz music<sup>12</sup>.

Following Gausden's advices, some HCP' students went to U.S.A. to experiment the local jazz scene and to improve their musical skills. One of those cases was the guitar player Pedro Madaleno, who attended some classes in Berklee College of Music (Boston) and New School of Social Research (New York), taking also some private lessons with local jazz musicians. In addition to the background that Madaleno acquired as a local jazz performer, he also developed the experience which enabled him to consolidate his activity as a jazz teacher. After his return to Portugal, in the early 1990's, Madaleno became in charge of the guitar, harmony, and composition classes at HCP (Roxo, 2010a).

Guitar player Sérgio Pelágio was another HCP student who crossed the Atlantic to meet the North American jazz scene and, specifically, its jazz educational system. In 1985 he arrived at New York where he studied with John Abercrombie, and, after that, he established himself in Boston for a period of six months as a Berklee student (Roxo, 2010b). Returning to Portugal, Pelágio became not only a teacher but also the director of HCP's School of Jazz, in a period when David Gausden was not available for such task. Talking about that period, Sérgio Pelágio tells that

I returned from U.S.A. with a lot of ideas. I had several books with me. HCP's school was in a problematic phase. So, I organized a study program and put together a team of teachers. My intention was to give consistency to the study program and more visibility to the school activities<sup>13</sup>.

Another important event during the pedagogical direction of Pelágio was the

foundation of the International Association of Schools of Jazz (IASJ), which had Hot Clube de Portugal's School of Jazz among its founding members. IASJ was an association of jazz schools from several countries, mostly European, projected by the saxophone player David Liebman. Pelágio considers that Liebman's intention was "to create a network of schools of jazz with regular meetings"<sup>14</sup>. Another person who accompanied the first years of HCP as an IASJ member, besides Sérgio Pelágio and Rui Martins, was Bernardo Moreira, who became HCP president in 1992. Moreira states that:

IASJ directors assumed the intention to constitute a lobby to ask the governments for an investment in music teaching for the youth people, especially in jazz<sup>15</sup>.

In addition to the interaction promoted with other jazz schools beyond borders and to the fact that HCP' School of Jazz positioned itself into a jazz education network, IASJ would have direct consequences in the school organization. Bernardo Moreira reminds that in the middle of the 1990's, HCP was represented in one of the IASJ annual meetings by his son, the saxophone player Pedro Moreira. Through the IASJ meeting, which promoted the interaction between the representatives of each school, Pedro Moreira made a contact with the directors of the New School for Social Research, presenting the activities of Hot Clube de Portugal and sharing some impressions about questions of jazz education. Sometime later, Pedro Moreira was invited to study in New School for Social Research. His father, Bernardo Moreira, tells that through the experience of Pedro in New York, it was possible "to understand how the New School for Social Research worked at the pedagogical and administrative levels, so that we could be able to transform HCP' School of Jazz in a school influenced by the New School methods". Besides that, Bernardo Moreira claims that he begun to ask the New School directors to send some teachers to HCP, during small periods, so that they could explain HCP teachers how the things were done in their institution. He explains that "we started to make small changes in our program according to the experience that Pedro was sharing with us from New York"<sup>16</sup>.

<sup>12</sup> Interview with Rui Martins conducted by Miguel Lourenço, Pedro Mendes and Pedro Roxo (Lisbon, 04/12/2014).

<sup>13</sup> Interview with Sérgio Pelágio conducted by Pedro Mendes (Lisbon, 17/07/2013).

<sup>14</sup> Interview with Sérgio Pelágio conducted by Pedro Mendes (Lisbon, 17/07/2013).

<sup>15</sup> Interview with Bernardo Moreira conducted by Pedro Mendes (Lisbon, 07/10/2014).

<sup>16</sup> Interview with Bernardo Moreira conducted by Pedro Mendes (Lisbon, 07/10/2014).

## 4. CONCLUSIONS

First of all, the elements that were being exposed in this article reflect the fact that there were some individuals particularly important in the development of the jazz teaching in Portugal. These individuals, who were determinant actors in the way in which Hot Clube de Portugal's School of Jazz developed itself, had already some kind of contact with the jazz educational system existent in U.S.A. and in some European countries. It was through the circulation of products and individuals that HCP created a jazz teaching program in line with the principles and methods of educational institutions of those countries. Zé Eduardo, by the contact with magazines and instructional books, confronted himself with the methods of some North American jazz educators such as David Baker and William Russo; Mike Ross and David Gausden were musicians with formal jazz training whose importance at the pedagogical level is recognized by the students who worked with them in the Portuguese context; Michael Garrick, Don Rendell and Tony Faulkner were influent musicians in the initial phase of the school.

Authors such as Henry Kingsbury (1988) and Bruno Nettl (1995; 2005) have already stressed the relation of music teaching with the values and concepts of a specific musical universe. Considering the mainly influence of the North American jazz educational system in institutions such as Hot Clube de Portugal, there are some evidences about the impact that this system had beyond borders, not only by shaping jazz teaching but also transforming this musical universe (see Wilf, 2014). It is possible and relevant to query how this influence expressed itself in individual actions, methods and programs; on the other hand, it remains valid to ask the way in which those principles were locally appropriated. In sum, to analyze the way jazz education developed itself is a determinant point to understand the transformations in jazz universe.

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