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Challenges of a digital approach:
considerations for an edition of Pedro Homem de Mello's poetry

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Pedro Homem de Mello (1904-1984) is one of the relevant lyric poets in 20th century Portuguese literature, whose works were subject to extensive authorial revision. This presentation argues that structural variance, as observed in the poet's compositions, can best be visualized through an electronic edition, and that the affordances of the medium contribute to reconceiving the concept of text, as a fluid entity that is subject to expansion, through its divergent manifestations. With that in mind, it will present examples where this kind of variation occurs, and point out a few challenges to going digital.

The first thing we have to observe is that Pedro Homem de Mello started his writing career during the Modernist period. Hannah Sullivan, in her book *The Work of Revision*, has already identified obsessive authorial revision with "the legacy of high modernism" and the multistage process that characterized the "print culture that nourished it". She claims that "Modernism writers […] used revision" not only through the kind of lexical substitution that aims to refine the expression, "but to make it new through large-scale transformations" of length

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and structure (Sullivan, 2013: 22). This could also be related to what Tanselle classified as *vertical revision* – that is, a rewriting that metamorphoses a text and seems "to make a different sort of work out of it" (Tanselle, 1990: 53).

There are many examples of vertical revision in Mello's poetry. Sometimes, the relationships between versions are obvious, as they involve mainly excision, extension or substitution of some parts of the poem, while the core of the composition remains the same. Other versions, however, seem to have more of "a filial relationship rather than one of direct descent" (Sullivan, 2013: 18). This is the case, for example, with two versions entitled "Saudade" (Mello, 1961: 49) and "Apolo" (Mello, BNP, E14, cx. 22). Altogether, only four half lines are shared, and those lines don't even appear in the same position. But there is more: these are just two of the nineteen witnesses assembled from a larger cluster of texts that have been identified so far. If we compare them all, we will find several different versions, with extreme variation from one another.

In such cases, we should perhaps ask what degree of variation creates a new version, and if differing versions can be distinguished (and edited) as separate texts. Peter Shillingsburg has already asked these questions and identified four criteria to measure variation: time, content, function, and material (Shillingsburg, 2000: 69). The second question remains especially problematic, though. Some critics consider that a work may be regarded as new whenever a certain degree of continuity is not preserved from one stage to the next (McLaverty, 1991: 137). Others argue that, no matter how different they may seem to be, versions "can never be revised into a different work" (Bryant, 2005: 85), and in no circumstance can be unlinked from one another. John Bryant is included in the second group and recommends that we edit multiple versions at once, mapping out the variation from one stage to another, and enabling users "to lead themselves along those paths" (Bryant, 2005: 123). Instead of an appended apparatus "that places that data in footnotes or endnotes" (Bryant, 2005: 127), editorial strategies must be devised to combine text and apparatus, thus enticing "readers into the pleasures of the fluid text" (Bryant, 2005: 133).

This is somehow difficult to achieve in a printed book. Although the idea of an integrated apparatus has been considered since Zeller's proposal in the early 70's (and later put into practice in Gabler's 1984 edition of the *Ulysses*), it is extremely difficult for readers to visualize variation through coded data, when versions are not formally similar. Alternatives

should then be considered. Sometimes a facing-page edition can be an option, when two versions with structural variance are involved. However, the material constraints of the book offer limited possibilities when multiple of these versions coexist.

As Bryant admits, fluid-text editions "can best be realized, perhaps *only* realized, through the extraordinary hypertextual features of the electronic medium" (Bryant, 2005: 145). Yet, an electronic approach could be undertaken in several ways, from static editions to what Peter Robinson envisioned as dynamic repositories of textual knowledge (Robinson, 2005).

In the first case, the electronic medium comes up as a mere publication platform, which relies on the hyperlinked architecture to relationally organize reading text, emendations, apparatus, and annotations. Because these sections are independently assembled, users still have to reconstruct the layers of the text themselves, as happens with any print edition. While that is, of course, not a bad thing, it offers limited possibilities to deal with texts where instability and versioning are as strongly governing principles as is the case with these poems.

That brings us to a new editorial paradigm, which is based on the functional integration of text and apparatus, so that new patterns and relationships may be rearranged through automatic processing. The most obvious advantage is the ability to compare multiple versions, at the user's discretion, and explore diachronic revision, with no single version being hierarchically privileged over another.

In order to make it possible, syntax and markup-language become an essential part of the design of the edition. This is where the Text Encoding Initiative <http://www.tei-c.org> comes into play, as a comprehensive set of guidelines for the representation of texts in digital form, which aims to empower processability and visualization tools.

While, according to a recent study (Franzini et al., 2016), only 37% of the examined electronic editions follow TEI (mainly because editors need to make their own customizations, in order to address specific phenomena), the number of projects adopting the guidelines "is gradually increasing", perhaps as a consequence of its "systematic growth and improvement" (Franzini et al., 2016: 175). This standardised implementation fosters interoperability, which is important not just from a maintenance perspective. It also allows tools to be shared by several similar projects around the world, facilitating one of the most demanding stages in the creation of a digital edition: the design of the graphic user interface. Since modern authors usually display intricate revisions in their texts, sophisticated software is required, in order to visualize

the underlying encodings in a flexible and dynamic environment. Developing such tools from scratch would involve extensive technical support, which in no way is available to individual projects such as this. Fortunately, by adopting the TEI guidelines, we can resort to open-source software with all-round tested solutions.

Among the freely available resources, there is one that generally suits the goals of this project and the specificity of the challenges raised by our author's poetry. It is the Versioning Machine <v-machine.org> – an interface for displaying multiple versions of text encoded with the TEI guidelines, which was originally conceived in 2000 by Susan Schreibman and has since been used in a number of projects with similar cases of vertical revision. Its current version 5.0 was released early in 2016 and is HTML5 compatible. This means that it has been developed to suit texts with multimedia requirements, such as Pedro Homem de Mello's poems adapted to fado, allowing image and audio files to be incorporated and aligned with the text.

Through its hypertextual architecture and a TEI-P5 conformant schema, the Versioning Machine is appropriate for a genetic-critical approach, favouring a text-centric view. Thus, emendations may be added to the transcriptions (using the <choice>, <sic> and <corr> elements), while the representation of the writing process is achieved by a parallel display of successive versions, enriched by in-document sub-stratification. Furthermore, a series of pop-up notes may also be encoded, in order to assemble para-genetic materials that are somehow related to the compositional history of the text.

The Versioning Machine's interface allows users to critically engage with the dynamics of revision, by comparing chunks of text, alongside word-by-word or line-by-line comparisons. These may occur in direct correspondence, or may involve different lines of each version.

This compare and contrast logic (that manifests across multiple versions at the same time) is only possible thanks to the underlying encoded apparatus. The VM 5.0 supports two different methods, described in the TEI-P5 critical apparatus tag set, which can be chosen according to the specificity of the text. While parallel-segmentation is the most straightforward approach, it doesn't easily deal with overlapping relationships of elements and structures. To get around this challenge, the VM 5.0 has built in the ability to encode documents with the location-referenced encoding method, which associates several lines with corresponding text by using the same value for the <loc> attribute within the <app>s that need to be assembled.

The visual rendering is that, by mousing over any of the lines within the same location value, all <rdg>s inside correlating <app>s will be highlighted in the HTML interface, providing a dynamic representation of compositional or revisional stages, which is substantially different from the print counterparts.

Where conventional book editions privilege a stable reading text, fully digital editions like this favour a continual textual flow that is mutable over time, since multiple assembled versions dialogue through the text's subtle fluidities. Such a heuristic display of versions allows for non-linear reading paths, and is particularly significant when dealing with authors from the Modernist period, because, as we have seen with Hannah Sullivan, they revised "more frequently, at more points in the lifespan of the text, more structurally and experimentally" (Sullivan, 2013: 22). Therefore, the decision to edit Pedro Homem de Mello's poems electronically is not just a matter of representation. It actually "conveys and embodies a" different, "pluralistic notion of text" (Sahle, 2016: 30-31).

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