

## From Malba Tahan to Mello e Souza: the construction of an identity (1923-1938) <sup>1 2 3 4</sup>

*De Malba Tahan a Mello e Souza: a construção de uma identidade (1923-1938)*

*De Malba Tahan a Mello e Souza: la construcción de una identidad (1923-1938)*

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### Abstract

This article aims to establish the parallels between the changes that occurred at the end of the 1920s concerning teaching mathematics in Brazil and the fictional production of Júlio César de Mello e Souza (Malba Tahan). The period chosen for analysis is circumscribed between the beginning of the 1920s and the publication of *O homem que calculava* in 1938. It is assumed that Malba Tahan appears before the writer Mello e Souza, which means an “Arab” writer. The process of identification with the pseudonym was gradual. There were doubts about the authorship at the time of the publication of the first short stories. In 1938, it was already known to everyone that Malba Tahan was the pseudonym of Mello e Souza. Therefore, we intend to work with two aspects. One focuses on how Mello e Souza has positioned himself as a fiction writer. The other consists of his activity as an educator and the reflections in his fictional production, especially in the work *O homem que calculava*. Both start from the assumption that there was a process of identity construction before the public.

**Keywords:** Malba Tahan, history of mathematics education, literature and press

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## **Resumo**

*O objetivo deste artigo é estabelecer os paralelos existentes entre as mudanças ocorridas no final da década de 1920 concernentes ao ensino da matemática no Brasil e a produção ficcional de Júlio César de Mello e Souza (Malba Taban). O período escolhido para análise está circunscrito entre o início da década de 1920 e a publicação de O homem que calculava, em 1938. We begin from the assumption that Malba Taban, "Arab writer", appears before the writer Mello e Souza, that is, as an "Arab" writer. O processo de identificação com o pseudônimo foi gradual. Na época da publicação dos primeiros contos havia dúvidas quanto à autoria, enquanto em 1938 já era conhecido de todos que Malba Taban era o pseudônimo de Mello e Souza. Pretende-se, portanto, trabalhar com dois aspectos. Um deles está voltado à forma como Mello e Souza se colocou como escritor de ficção ao longo dos anos. O outro condiz com a sua atividade como educador e os reflexos em sua produção ficcional, em especial, na obra O homem que calculava. Ambos partem do pressuposto de que houve um processo de construção de identidade perante o público.*

**Palavras-chave:** Malba Taban, história da educação matemática, literatura e imprensa

## **Resumen**

*El objetivo de este artículo es establecer el paralelismo entre los cambios ocurridos desde lo final de la década de 1920 en la matemática en Brasil y la producción ficticia de Júlio César de Mello e Souza (Malba Taban). El período elegido para el análisis se circunscribe entre principios de la década de 1920 y la publicación de O homem que calculava, en 1938. Se supone que Malba Taban, "escritor árabe", aparece ante el escritor Mello e Souza, o sea, como un Escritor "árabe". El proceso de identificación con el seudónimo fue gradual. En el momento de la publicación de los primeros relatos, existían dudas sobre la autoría, mientras que en 1938 ya era de todos conocido que Malba Taban era el seudónimo de Mello e Souza. Por lo tanto, se pretende trabajar con dos aspectos. Uno de ellos se centra en la forma en que Mello e Souza se ha posicionado como escritor de ficción. El otro es consecuente con su actividad como educador y los reflejos en su producción ficcional, especialmente en la obra O homem que calculava. Ambos parten del supuesto de que hubo un proceso de construcción de identidad ante el público.*

**Palavras-clave:** Malba Taban, historia de la educación matemática, prensa y literatura

## Introduction

I am the humblest of his attentive admirers. Each tale that his magic pen records is, for me, the reason for extraordinary well-being. I feel a strange happiness at the touch of the gentle, loving, moralizing preachings that bear lessons of high value to souls in formation and even those already formed.

His valuable books are a treasure that I guard with care. I feel, however, that his precious writings do me harm: the curiosity to know him (Fundo Malba Tahan, 02.004.0042-02, our translation).

This letter was written by a reader of Malba Tahan's narratives. It has no date, but according to the form of archiving of the author's scrapbooks in the Malba Tahan Fund at the Centro de Memória da Educação of the Faculdade de Educação of Unicamp (CME), it must have been written around 1930. It draws attention for two reasons. The first is in the interpretation given to the tales – to this date, Mello e Souza<sup>5</sup>, signing as Malba Tahan, had only written short stories - the other is in the curiosity to meet the writer.

Was this curiosity derived from confusion between Arab author/writer, or did the reader know that Malba Tahan was the pseudonym of Mello e Souza, a mathematics professor? The main topic of this article is to show the historical process that generated the creation of Malba Tahan until the publication of his novel, *O homem que calculava*, in 1938<sup>6</sup>, also considering the debates around the changes in mathematics that occurred at the end of the 1920s in Brazil. The analysis of some short stories, the criticisms made to his works, and the publicity of his first books (especially *Céu de Allah* and *Contos de Malba Tahan*) indicate a confusion between pseudonym and author. Would Mello e Souza be Malba Tahan or not? Was Malba Tahan an "Arab" writer? Who was his audience? These questions will guide the first part of the article, of which the conclusion will indicate that Mello e Souza intended to shuffle identities. We will

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<sup>5</sup> Júlio César de Mello e Souza was born in 1895 and died in 1974. He was a mathematics professor at several institutions, including *Colégio Pedro II*, and author of several works of fiction and mathematics books. He had extensive publication of his texts in the press.

<sup>6</sup> André de Faria Pereira Neto (2012) states that the 1st Edition is from 1937. However, in a report of July 20th, 1939, the work would be in its 4th Edition in less than four months, which indicates an enormous popularity (Tahan, 29 jul. 1939). The beloved writer of all readers of Brazil. There are advertisements in the newspapers of the time announcing the 2nd Edition at the end of 1938. The first edition was still announced that same year (*O homem que calculava*, 24 set. 1938, 22 dez. 1938). Possibly, in July 1939, there were four editions of the Getúlio M. Coast publisher. In 1938, the ads were published by A.B.C. No references were found for the year 1937.

show that Malba Tahan initially emerged as a writer of Arab origin, becoming the pseudonym of Mello e Souza for most of his audience after only a few years.

In a second moment, we will observe the debates of the mathematical discipline generated at the end of the 1920s at *Colégio Pedro II* and the approval of the changes in the period, paying special attention to the newspaper clippings in the Malba Tahan Fund. As will be seen, Mello e Souza was inserted in the movement of the discipline's debates and changes (concerning classes and didactic material). This process is appropriate for his literary works, especially *O homem que calculava*, the writer's first novel.

In the last part of the article, we present a small foray into *O homem que calculava* to show that, especially at that moment, Mello e Souza assumed, in a certain way, the teacher-literate and identified himself as Malba Tahan for all his readers bringing mathematics in all chapters. At that moment, Malba Tahan, even with so many incursions into the Arab world, can assume his identity: that of Júlio César de Mello e Souza.

The method used for elaborating the article is based on analyzing the works from the context of production, considering the publication of short stories in the press of the time and in the form of a book. Still concerning the press, we regarded as excerpts of comments on the works and author. As far as possible, importance was also given to the material selected by Júlio César de Mello e Souza in his personal collection. Thus, letters, newspaper clippings, and markings made in texts by other authors cataloged by Mello e Souza himself helped in the material analysis.

Encompassing reading practices and possible appropriations of texts consider the perspective of analysis given by Chartier in which the works are in dialogue with the various subjects involved in the production process. The meanings employed by readers depend on a reconstruction of the relationships between the reader, author, editor, and other subjects involved in the production process; that is, they consider a contextualization in the universe of production and reception of works. They also consider the existence of "plural appropriations that always invent, displace, subvert" (Chartier, 2002, p. 259, our translation). In this sense, the fact that "Malba Tahan" appeared in the foreground at the beginning of Mello e Souza's literary career is part of a process of building an image that will reflect that which Mello e Souza, as a teacher and writer, created for himself throughout the 1920s and 1930s.

## Malba Tahan building Mello e Souza

With the curious satire entitled *O juiz*, we begin publishing a series of short stories by the original Anglo-Arab writer Hank Malba Tahan within a few days. One of our collaborators will translate and adapt, especially for the readers of "A Noite", all the stories and legends of the main works of Malba Tahan – *Rosa-el-Kali*, *Histórias imitadas*, *Tempo de guerra*, *Mil histórias sem fim*, etc – to which we will publish under the suggestive title of *Contos de mil e uma Noites* (Contos de mil e uma 'noites', 7 jun. 1924).

Since July 1924, countless short stories have been published and signed as Malba Tahan, not only in the newspaper *A Noite* from Rio de Janeiro. From that moment, it is clear that there is an attempt to build an identity – that of the writer Malba Tahan. There are two movements of fundamental importance. One of them is in the direct relationship that appears in the newspapers of the time, especially during the late 1920s, between Malba Tahan and teacher Mello e Souza. The other refers to the texts (short stories) signed by Malba Tahan and the possible meanings for readers.

For an attentive reader, Malba Tahan was a pseudonym, and the writer who supported him was someone else, a literate. The use of pseudonyms has been common worldwide since the nineteenth century, and the identity construction for the pseudonym was also not unprecedented. Fernando Pessoa had already done this and created more than one pseudonym with different identities. In Brazil, still in the nineteenth century, the series *Balas de Estalo* of the *Gazeta de Notícias* had several pseudonyms, each of a writer and, consequently, had narrators with diverse identities<sup>7</sup>. Alúcio Azevedo, without signing, wrote a series of letters to the newspaper *A semana* in early 1885 to clarify the case of the disappearance of Castro Malta. For readers of the time, fiction and news merged, so much that in the latter case, without any explanation, the letters turn into a “novel at the stroke of a pen”<sup>8</sup>.

However, if, on the one hand, these identities for writer-characters were part of a specific cultural context and journalistic and fictional spaces were fluid (Kalifa, 1995; Thérenty, 2003), this does not mean that Mello e Souza only followed in the footsteps of other writers.

<sup>7</sup> About the case of *Balas de Estalo*, see Cernic (2008).

<sup>8</sup> Later collected in a book (Azevedo, 1985).

He innovated by presenting a certain "Orient" that makes the reading public identify themselves, going on to achieve enormous success, already noticeable in the second half of the 1920s.

This process gradually occurred to identify Malba Tahan as Mello e Souza. There was a clear intention to shuffle and create suspense around Malba Tahan's identity. Malba Tahan was the pseudonym of Mello e Souza only to a very attentive reader and his fellow writers.

The desire of Professor Mello e Souza to launch into the field of fiction from the first moments is clear. Thus, the first reference to the author Malba Tahan appears in a short story contest held by *Revista da Semana* in 1923. *O perfume indiano* was selected to compete among the most diverse short stories by Brazilian or foreign authors residing in Brazil. Such authors could not have a published book nor the identification of a real name (Concurso de contos da 'Revista da Semana', 1923). The name "Malba Tahan" emerged immersed in this universe of authors who wanted recognition and linked directly to a fictitious name.

Shortly after that, several short stories by Malba Tahan began to appear, first in newspapers in Rio de Janeiro, then in other capitals and municipalities of the countryside. The first work appeared in 1925, a collection of short stories: *Contos de Malba Tahan*, a direct reference to the same texts published (or not) in the newspapers.

Those who only read the tales in the newspapers of the time or in books such as *Contos de Malba Tahan* (1925), *Céu de Allah* (1928), and *Lendas do oásis* (1933), books that appear frequently in advertisements and critical references, could imagine Malba Tahan as an Arab writer. This is given by the references to "stories and legends" of Arabic origin; in the indication that it was part of one or another book already published, as indicated by the initial quote about the publication of his short stories in the newspaper *A Noite*; in the use of terms specific to another, distinct, different culture.

The Anglo-Arab ancestry of Malba Tahan becomes apparent in the short story *A bússola* (Tahan, 1924). The story, narrated in the first person, tells about a troop in the desert who needed to reach a city for which they had an "Arab" guide. After a storm, the guide who said he was lost finds the way only when the commander grants him a "compass" that was, in fact, a leather bag with gold coins. Upon reaching the city, the commander considers the guide a traitor and intends to shoot him. At the end of the story is the following: "I gave the order to fire. Malba Tahan (from the book *Tempo de guerra*)".

Malba Tahan could be an Anglo-Arabic writer. In *Contos de Malba Tahan* (1925, our translation), he is introduced as a “famous Arab writer” who “lived twelve years in Manchester. He toured Russia, China, Persia, and India” and “maintained literary correspondence with Anatole France, Rudyard Kipling, and the noted French philologist and orientalist Professor Gaudefroy-Demombynes”.

The preface to the first edition of this book presents a certain mystery surrounding the “personality and work” of Malba Tahan. He indicates that he will transcribe an excerpt from the “Short Stories Magazine” from Philadelphia with a chronicle about the writer to provide a plausible character. This chronicle explains that Malba Tahan had an ephemeral passage but left some writings and was even a “head of school”, possessing “several books of short stories produced in a sui generis style”, with “short stories”, “very thrilling indeed” (Tahan, s.d., p. 14). He lived a “life of adventure,” and it is said that, being in Russia with a “company of street entertainers”, “the thread of his life is lost (he was arrested for suspected spying) “to finally” reappear in Persia, India, and Shanghai”. According to the chronicler (informed by someone else), one can conclude the influence of “Kipling, Doyle, Poe, and Rosny” from his short stories (Tahan, s.d., p. 15).

If the relationship between Malba Tahan and Mello e Souza was not evident in 1925, from 1927, the writer and pseudonym began to be linked directly. Visiting the municipality of Juiz de Fora, the *Diário Mercantil* links the two, calling him “appreciated Arabist ‘conteur’”, “short story writer of Oriental affairs” and stating that “the writer Júlio Cesar de Mello e Souza, known throughout the country under the pseudonym of Malba Tahan, is coming to this city” (*Mercantile Journal*, 1927, our translation) to hold a conference on children's literature.

By clearly displaying the relationship between author and pseudonym, the advertisements of *Contos de Malba Tahan* made in the newspapers *O Tico-Tico* and *O Malho* between 1925 and 1929 relating Malba Tahan to an Arab writer: “adaptation of the work of the famous Arab writer”, become dissonant. In a kind of game, the identity of Malba Tahan as Mello e Souza happened gradually. Certainly, this was a form of valuing the various narratives that pointed to a deep knowledge of another culture.

Thus, various works emerged, from which their tales were extracted, such as *Histórias Imitadas* (*O juiz*); *Roba-el-Kalil* (*Devoradores de reis*, *O mais honesto*, *Sassevasá*); *Sorr-el-layal* (“O leão”); *Tempo de guerra* (*A bússola*), among others, indicating that a short story was already published in

one of these volumes underscored the story invented for the pseudonym, reaffirming the writer's Arab origin. However, none of these books existed.

If tales were extracted from non-existent books, others were derived from later books, such as *O homem que calculava*. Thus, the tale *O homem que calculava* (*Diário de São Paulo*, 1929) occupied almost an entire newspaper page<sup>9</sup>, equivalent to chapters I to IV of the book. The "young calculator" also had another name: Mesoud ibn Haran, instead of Beremis, and there are changes in the text. The text is more concise in the short story published in the newspapers; there is no division between the chapters, not even the small abstracts that occupy the initial part of the chapters in the book. A change is noted in the initial dedication: from *Sete sábios cristãos ou ateus* (in the short story - Fermat, in the book - Descartes, Newton, Pascal, Leibniz, Euler, Lagrange, Comte) became "agnostics" in the book.

Another reference to *O homem que calculava* appeared on March 31st, 1931, in *Diário da Noite* of Rio de Janeiro in the *Lanterna Mágica* section and did not refer to any of the chapters in the book. The title is the same, *O homem que calculava*, and the reference is at the end of the narrative: "of the book *O homem que calculava*". Can one conclude that the writer already had in mind a literary project that ended with the publication of *O homem que calculava* in 1938? Or do these samples point in another direction? Considering that Mello e Souza had a habit of referencing other works that were never published, perhaps the best thing to consider is that no project was made over time.

In 1926, in the "new books" section of the *Revista da Semana*, the *Contos de Malba Tahan* was linked to Mello e Souza, but removing the coincidence between author and pseudonym:

Malba Tahan, an Arabic writer unknown in Brazil, was publicized by Mr. J.C. de Mello e Souza. He published many short stories in *A Noite* and short and strong stories of great moral background in the *Revista da Semana*, betraying the Arab character in its formula of parables (*Os novos livros*, 1926).

Many tales (but not all) had a conclusion that referred to a certain "moral of the story". Thus, *O leão* for example, published in *O Tico-Tico* (Tahan, 19 jan. 1927), tells the story of four young brothers and travelers who crossed a forest. Three of them had studied "magic, alchemy, and the occult sciences" and the last was only very intelligent, with a "good sense and practice

<sup>9</sup> "Special piece for the *O Diário de São Paulo* and *O Jornal do Rio*".

of life”. Upon coming across the bones of a lion, the three magical brothers agree to show “the power of science” to the “ignorant brother”. Thus, the first, with a magic word, rebuilds the lion's skeleton to perfection; the second provides muscles, skin, blood, and organs; the third says that he give life and strength to the lion thanks to a magic word.

At this moment, the fourth brother says to the others: "Careful! Don't utter that enchanted syllable! Do you not see, then, if this lion regains his life and strength, he will be able to devour us?". Faced with the refusal of the three brothers, the fourth brother asks that they let him climb a tree before pronouncing the word. The lion quickly devoured the three magicians as soon as he came to life. Malba Tahan's conclusion: "Ah reckless sages! Science alone is not enough for mankind. It is of no avail unless it is allied to Prudence and Moderation." This kind of conclusion was common in several of his tales and point to similar simple teachings, that knowledge is worth nothing without prudence, or, to return to the beginning of the narrative, without the “intelligence, common sense, and practice of life.”

If the perspective of Mello e Souza, with the creation of the pseudonym Malba Tahan, was to consolidate himself as an “Anglo-Arab” writer even if, from time to time, the pseudonym and Mello e Souza related, the attempt to insert himself into an already consolidated market of children's literature was clear<sup>10</sup>. In the meantime, it is worth mentioning the large part of short stories published in the children's weekly *O Tico-Tico*, in the “Children's newspaper” section of *O jornal* in the *Jornal do Commercio*, in the section subscribed by the “Brazilian Education Association”, or the nomination of *Contos de Malba Tahan* as a book to be part of the *Biblioteca para crianças e adolescentes* (Associação Brasileira de Educação, 1928).

Mello e Souza's desire as Malba Tahan was to insert himself as someone who dominated another culture, considered distinct. Thus, many are the tales in which the subheadings stand out, such as *Segundo as crenças muçulmanas*, (Tahan, 19 jan. 1927), *Fábula hindu para crianças* (Tahan, 1931a), *Parábola hindu* (Tahan, 1931b), *Lenda árabe* (Tahan, 1931c), and *Lenda oriental* (Tahan, 27 fev. 1927).

Still concerning the approach of the writer Mello e Souza with the pseudonym Malba Tahan, a report published in the *Malbo* in 1933 indicates that he is the “writer of the Orient”. Still, it points out that it is an “Arabic name that hides one of the most brilliant expressions of

<sup>10</sup> On the children's literature market see Raffaini (2016), Hansen (2016), and Leão (2007).

mathematics in the national magisterium”. Even if the newspaper did not indicate the relationship between Mello e Souza and Malba Tahan (not even by photography), readers who closely followed Malba Tahan's works certainly knew that it was the pseudonym of Mello e Souza. In any case, the writer does not appear in the photograph of the *Leitura das mãos de Malba Tahan* (“De como Malba Tahan”, 18 fev. 1933):

**Figure 1.**  
*February 18th, 1933*



As mãos de Malba Tahan, que não deseja ser conhecido dos leitores, examinadas pelos professores Sana-Khan e Chacarian, acompanhados pelo nosso companheiro de redação.

**MALBA TAHAN** é o mais popular dos escritores brasileiros — destes últimos cinco anos — exceção de Humberto de Campos, que sustêm e por muito tempo susterá ainda o record de popularidade intelectual.

Os contos orientais de Malba Tahan, nome arabe que esconde uma das mais fulgurantes expressões da mathematica no magisterio nacional, descendente de illustre familia brasileira, os contos orientais de Malba Tahan, personagens mysterioso para um sem numero de leitores, são publicados, primeiramente, ineditos, num ou noutro jornal ou revista do Rio, e transcritos, desde logo, nas publicações maiores das outras capitães e cidades circumvizinhas e dali em um numero sem conta de jornalecos do interior, passando, já então, de bocca em bocca, os ensinamentos e as palavras de sabedoria das criaturas de Allah e seus prophetas...

Humberto de Campos, esse nome que orgulha a literatura patria, com o pseudo de Abi-Hzdjale tambem se dedica, vea em quantos de vez contos orientais. E é elle, o homem que viveu "Memorias", quem nos fala de Malba Tahan, em um maravilhoso prefacio que fez ao seu livro "Mi historias sem fim".

"Ao Sr. Malba Tahan, cujo nome é, actualmente, um dos mais vulgarizados e discutidos das nossas letras, e cujos contos, es-palhados por todo o Brazil e admirados em todo elle, são transcritos literalmente em toda a imprensa de lingua portugueza e traducidos nas outras deste continente e da Europa, com a gloria de haver sido, entre nós, e, creio mesmo, na America do Sul, o primeiro escritor de genio arabe".

E mais adiante: "A formação oriental do espirito geographicamente brasileiro do Sr. Malba Tahan podia ser objecta, evidentemente, de uma pesquisa de Freud".

Esta phrase de Humberto de Campos, dita, assim, numa época em que a moda é a sciencia que tomou o nome de Sigmund Freud — a sciencia baseada na inconsciencia... — aguçou a nossa curiosidade de jornalista que vem acompanhando, em reportagens que o publico chama de sensacionais, os metodos scientificos da leitura pela mão dos professores Sana-Khan e Chacarian, que affirmam, em suas obras publicadas, irem além da psychanalise do sábio austro-israelita.

E isso é uma grande verdade. Temos testemunhado o acerto de um sem numero de doenças passadas e presentes, reveladas pelos professores Sana-Khan e Jorge Chacarian, á leitura de mãos, e ainda a "descoberta" de particularidades que, ditas em voz alta, fariam corar um frade de pedra... Que o digam um certo psychiatria do Hospital Inquery de São Paulo e Laura Suarez...

Os chirosophos orientaes possuem o dom de ler o destino dos homens nas linhas das mãos. E foi por isso mesmo, talvez, que Malba Tahan, vestindo a personalidade dos desertos e lembrando as suas phrases de sabedoria, á sombra dos castis e das tamarceiras, offerecendo seu livro "Céo de Allah" ao scienciaista armenio, escreveu: "Ao professor Onig Sana-Khan a quem Allah deu o dom de ler o destino nas linhas das mãos, para que leia o destino da alma, offercece Malba Tahan".

Correspondendo á delicadeza, o professor Sana-Khan offerceu "A Mão, os Sonhos e o Destino" ao autor de "Lendas do Deserto", chamando-o de "rouxinol do deserto".

Gentilezas...

O MALHO approximou o escriptor Malba Tahan dos chirosophos orientaes. Porque O MALHO, como ninguém outro, desejava saber se nas linhas das mãos do escriptor brasileiro, havia signaes de sua descendencia ou qual-quer caracteristica possivel do orientalismo.

E ainda Humberto de Campos quem escreve, a proposito, no seu citado prefacio: "Quantos acedidos terão dormido no amago deste legitimo descendente de portuguezes os hormentos da sua lingua precedencia armenia? Por que só agora, ao fim de tantas per-rogões brasileiras do mesmo ramo luzitano, surge para a actividade da intelligencia este moço que os arabes deixaram no peninsula ibérica, e que de repente acorda como a princeza adormecida no bosque ou como aquelle monge que excutava o pastor encantado, com a mesma alma, com a mesma imaginação, com as mesmas tendencias de espirito, como se tivesse chegado hontem de Bassora ou de Bagdad".

Uma vista de olhos na mão esquerda de Malba Tahan, um minuto de concentração

(Conclue na pagina 30)

**De como Malba Tahan, o escriptor do Oriente, encontrou-se com os professores Sana-Khan e Chacarian, a quem Allah deu o dom de ler o destino dos homens...**

Por onde se vê que nome não é documento... — Escrever contos orientaes não é o mesmo que falar o idioma — De quando uma opinião de Humberto de Campos aguçou o faro do jornalista — Freud...



A mão esquerda de Malba Tahan, prova inédita para O MALHO.

A very different situation from a few years later, in Belo Horizonte, in which Mello e Souza, when addressing the reporter, emphasizes that the interview would turn to the "Oriental writer" due to the "complex issues that guided the educational field"<sup>11</sup>: "Malba Tahan who is at your disposal for any question regarding the Orient". Mello e Souza appears in the center of the photograph, and there is no doubt about the identity of Malba Tahan. Everyone now knew that Malba Tahan was Mello e Souza (*Diário*, 1936).

## The mathematics of Mello e Souza and the dialogue with the history of education

At least two dimensions surround the mathematics taught by Mello e Souza. One of them defends that he was "a pioneer and innovator" (Lorenzato, 1995, p.101), "a precursor concerning the teaching of mathematics" (Lorenzato, 1995, p. 102, our translation), a "visionary" who "planted the seeds of mathematical education and interdisciplinarity" (Faria, 2004, p. 175, our translation). In more than one article, Lorenzato does not fail to indicate admiration for the "master"<sup>12</sup>. Juraci de Faria, very close to Lorenzato, favors the performance of Mello e Souza, showing his exceptional ability to teach mathematics simply, encouraging the student to take an interest in the discipline.

The concept of an "innovative" and "ahead of its time" educator has been incorporated by more than one author, including Sérgio Lorenzato (1995, 2005), Juraci de Faria (2004), and Souza e Fossa (2014). Pioneering for these authors is a consequence, mainly, of interdisciplinary teaching of mathematics, in which the appreciation of understanding by the student occupies a central place. Making classes pleasant and uncomplicated was the goal of Mello e Souza, who proposed "alternatives to improve the teaching-learning of mathematics" (Lorenzato, 1995, p. 97, our translation) when the student was not yet valued. There was no conception of

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<sup>11</sup> I am referring to the reforms that have taken place since 1929. In the case of mathematics, there was a fusion between the contents of arithmetic, algebra, and geometry, which became officially valid with the Francisco Campos reform in the 1930s and caused several debates among Brazilian teachers. On the subject see, Valente (2004). Concerning the reforms in the field of education at the time, see Carvalho (2000), Paulilo (2015), and Vidal (2008).

<sup>12</sup> See Lorenzato (2015).

Mathematical Education and Mathematics Teaching Laboratory, something more common among teachers today (Lorenzato, 1995, p. 97-98)<sup>13</sup>.

For Lorenzato, creating Malba Tahan was a way to make mathematics accessible and uncomplicated to more people averse to the discipline. With the creation of the Oriental pseudonym, Mello e Souza wished to “contribute to improving mathematics teaching” (Lorenzato, 1995, p. 99, our translation). According to Lorenzato, this can be confirmed in the preface to the 2nd Edition of 1961 of the *Antologia da Matemática* since the author explains that the book was not written only for those who are close to the "mathematical world" but for everyone who can understand "simply and clearly, [from] stories, fantasies, biographies, curiosities, paradoxes, famous errors, famous problems, in short, [from] subjects applicable to the living and efficient teaching of mathematics' " (Lorenzato, 1995, p. 99 our translation).

“Being ahead of his time” was a consequence of these innovations and the pioneering work in developing an interdisciplinary methodology that facilitated the understanding of mathematics to other teachers through the numerous extension courses that Mello e Souza taught throughout his life, including the two courses attended by Lorenzato in São Carlos in 1958<sup>14</sup>. For Lorenzato and Juraci de Faria, the literary works of the educator reflect the concern to create a movement to encourage the teaching of the discipline.

Therefore, *O Homem que Calculava* was, for Lorenzato, “out of its time” since it was written “50 years before the emergence of official Curricular Proposals that recommend teaching in an interdisciplinary manner ... and mixes knowledge of Mathematics, Geography, History, Culture, Art, and the Portuguese language” (Lorenzato, 2015, p. 7, our translation), generating the “taste for mathematics” and, at the same time, considered a “milestone in the history of Brazilian mathematical education” (Lorenzato, 2015, p. 7, our translation). Mello e Souza was, for this author, a "herald" and a "heretic" since he was against what was in force in the teaching practice of his time (Lorenzato, 2015, p. 10).

For Juraci de Faria, the role of the writer was parallel to that of the educator, as it helped create a new teaching methodology for mathematics (Faria, 2004, p.114), which was not accepted by “teachers and educators of his time, causing Mello e Souza to be excluded by this

<sup>13</sup> "Actuality" would be 1995 according to the article.

<sup>14</sup> Courses “Metodologia da Matemática na Escola Primária” e “A Arte de Contar Histórias”. On the subject, see Lorenzato (1995) and Faria (2004).

innovative conception” (Faria, 2004, p. 177, our translation). Souza e Fossa (2014) also reiterates that Mello e Souza continued the thinking of essential educators, such as Euclides Roxo, Cecil Thiré, and Ernesto Raja Gabaglia. For these authors, the production of textbooks, in parallel with the elaboration of courses for teachers and recreational mathematics invented by Mello e Souza in the magazine *Al Karismi*<sup>15</sup>, has highly contributed to mathematics education (Souza & Fossa, 2014, p. 5-6).

Despite this conception “ahead of its time”, it is impossible to understand the actions of a historical subject, considering that he is not in dialogue with other forms of doing in his own time. In this sense, it becomes more plausible that Mello e Souza proposed methods that derived from the field in which he was inserted: other educators, teachers who commented on his works, and even the literature he developed aimed at young people and children of the time.

A counterpoint to the opinions surrounding the crucial role of Mello e Souza for pedagogical innovations regarding mathematics teaching is in the work of Wagner Valente, which shows the effective participation of the Brazilian educator in a broader context of changes related to teaching in Brazil. Its analysis is guided by the actions of the teacher and author of textbooks in a historical moment considered relevant to the discipline.

A series of reforms in the Brazilian national education organization followed the seizure of power by Getúlio Vargas (Valente, 2004, p. 174). Since then, textbooks that have become “true best-sellers” have been produced, considering the number of copies sold. *Colégio Pedro II*, where Mello e Souza taught classes with teachers such as Euclides Roxo and Cecil Thiré, was a space of dispute in mathematics, generating numerous debates after the 1930s.

Mathematics resulted from the combination of arithmetic, algebra, and geometry and became part of the curricula in 1929 (Valente, 2004, p. 174). Euclides Roxo published a manual with a revolutionary project at the time, maintaining a dialogue with the parameters of the newly created discipline (Valente, 2004, p. 181). However, as Valente points out, there were intense debates among the teaching staff in rejecting Roxo's manual. Mello e Souza stands out with a position contrary to the fusion generated with the union of these distinct branches (Valente, 2004, p. 181), which is made explicit in the heat of the discussions generated around textbooks and the position of other authors, such as Jacomo Stávale (Valente, 2003).

<sup>15</sup> About the magazine *Al Karismi*, which was published between 1946 and 1951, and *Lilaváti* (1951), see Faria (2004), Siqueira Filho (2008), Oliveira (2007).

Despite maintaining a favorable position to the precepts of the *Escola Nova* - valorization of student interest, intuition, and logical reasoning as opposed to memorization (Miorim, 1998, p.164) – Mello e Souza maintained a position contrary to the same renewals in their arguments with other authors of textbooks. Thus, in *Um livro ridículo e errado*, an article published in the *Nação* in 1933, he concluded that “the theoretical part [should be] impeccable from the perspective of the rigor with which the theorems and the concepts and definitions are presented” (Miorim, 1998, p. 164, our translation). Therefore, for him, the renewal demanded a "mathematical rigor", diluting the new proposal to unify the branches of mathematics. For Valiant, this is stated in the preface of *Mathemática: 1º ano*, in which Mello e Souza translate the “fusion of arithmetic, algebra, and geometry - as ‘confusion’” (Valente, 2003, p.165, our translation).

Therefore, Valente has an opposite position to the authors cited above, who perceive Mello e Souza as a “pioneer” and an educator “ahead of his time”. In parallel to the debate that took place around mathematics, this author shows how Mello e Souza occupied a preponderant space in the publication of textbooks, and, after realizing that he would not have space in the continuity of his collection published in the 1920s, Euclides Roxo joined Cecil Thiré and Mello e Souza in the publication of another collection of mathematics textbooks, which would become a publishing success (Valente, 2004, p. 164).

This dispute in the book market is understood by Valente as fundamental in the heated debates between Mello e Souza and other educators who also published textbooks. The controversy with Jacomo Stávale (who also has a refractory position concerning the new proposals for teaching mathematics, and Mello e Souza and most of the Brazilian teachers)<sup>16</sup> can be understood from the perspective of the dispute surrounding the textbook publishing market in the Rio de Janeiro-São Paulo axis, which had an ally in Mello e Souza in the *Revista Brasileira de Mathematica*.

The educator was editor-in-chief of the same *Magazine*. It presents numerous announcements of the books by Mello e Souza and can be conceived as a space for the defense of the carioca hegemony (Valente, 2003, p. 161-162, 2004, p. 181), in which the textbooks by

<sup>16</sup> On the subject, see the articles by Valente (2003, 2004).

Mello e Souza stand out, which found a space to weaken the work of its competitors in the journal<sup>17</sup>.

The creation of Malba Tahan and his consequent publishing success implies, among other elements, understanding how Mello e Souza built a certain image for his audience, which cannot be understood independently of the controversies with authors of other textbooks the educator intended to take from the publishing market (Valente, 2004, p.181) in favor of his manuals. A *Revista Brasileira de Matemática* occupied a preponderant space, as did the numerous articles and fiction written in various newspapers of the time.

Valente's analyses are fundamental to understand the history of mathematics in Brazil. The attention to disputes in the field of publications has interwoven relationships with the publishing market and its marketing facet. The 1930s, especially between 1930 and 1936, saw an astonishing growth of the publishing market that would give birth to a book industry; disputes in mathematical publications occurred at that same time<sup>18</sup>. However, the importance of interdisciplinarity that permeates the daily educational activities of Mello e Souza cannot be denied. Lorenzato, Juraci de Faria, and Souza e Fossa point to this perspective articulated innovatively in teaching mathematics, making the subject interesting to students. According to these authors, literature and the role of "storyteller" exercised by Mello e Souza were central to this.

One perceives the writer's concern with the changes concerning the teaching of mathematics, so much so that he kept several discussions regarding the teaching and methodology of mathematics in his personal collection. It is impossible to consider that Mello e Souza was "out of his time". He dialogued with other authors, and the joint publication of the didactic works of Euclides Roxo (perhaps the greatest supporter of the reforms) with Cecil Thiré in the 1930s proves this fact. Yes, Valente is right when he points out a fierce dispute of works in the publishing market, but it was not only because of this that Euclides Roxo, Mello e Souza, and Cecil Thiré launched their didactic works. They tried to change the methodology of teaching mathematics, as proposed by the Francisco Campos reform in 1930 and two years earlier at *Colégio Pedro II*. In a way, they defended an ideal.

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<sup>17</sup> On the subject, see Valente (2004).

<sup>18</sup> According to Hallewell (1985, p. 337-338), the figures for São Paulo indicate a growth of 600%, and the reissues followed each other, to the point that a writer like José Lins do Rego expressed that he could already live off his copyrights.

Therefore, making mathematics more accessible and valuing interdisciplinarity goes hand in hand with disputes in the book market. However, this perspective is being put by the debates of the time and does not make the educator a person “ahead of their time”. Mello e Souza will approach method and fictional stories concerning mathematics teaching. This is noticeable in works such as *Tudo é fácil (Matemática infantil)*, written in partnership with Irene de Albuquerque in 1937. From short narratives, the authors insert forms of teaching mathematics by bringing it to situations that could be part of the students’ daily lives.

An approach to the broad and vast work of Mello e Souza and its relationship with creating a personal archive (daily concern of the educator) should consider its insertion in the publishing market of textbooks and fiction and the interdisciplinary perspective of his activities as an educator. The problem with the paths that mathematics took at the end of the 1920s is evident, considering that Mello e Souza followed the debates around the changes in the discipline closely. This is stamped in the letter of Antenor Nascentes, an important philologist, sent to the author on December 15th, 1930:

Júlio,

The book you wrote with Thiré is magnificent.

Why wasn't I born thirty years later so I could learn from it?

How the children who begin mathematics in 1931 will be happy!

It even seems that mathematics is the least (sic) of the disciplines.

What master illusionists you are! What thaumaturges!

(Fundo Malba Tahan, 02.007.0014-02).

There is the debate between Euclides Roxo and Joaquim de Almeida Lisboa, both teachers at *Colégio Pedro II* in the 1930s, in material archived by the author in his personal collection. Published by *Jornal do Commercio*, we note a concern, of Euclides Roxo, in making mathematics accessible to students; that is, a methodological and didactic perspective of teaching was as important as the mastery of the discipline. A teacher who considers only erudition (as mentioned in the case of Almeida Lisboa) would not fit into the molds of the reforms proposed for *Colégio Pedro II*.

According to Miorim, the *Escola Nova* movement began to change education in the country in the 1920s. These ideas were adapted to the teaching of mathematics in 1928 with Euclides Roxo's proposal to unite the subjects of algebra, arithmetic, and geometry in a single

mathematics and make the student realize the connection between the three branches (Miorim, 1998, p. 96-99). It also meant bringing real situations to the field of mathematics study and tuning them into the student's daily school life (Miorim, 1998, p. 90).

A decree from January 15th, 1929, sanctioned the mathematics teaching reforms. Shortly after, the decree became valid for all schools (April 18th, 1931, and consolidated on April 4th, 1932). The debate between Almeida Lisboa and Euclides Roxo occurred after structuring the reform at *Colégio Pedro II*, thus becoming fundamental to understanding it from a terrain of disputes that had not yet been consolidated. Only one year after installing the reform in *Pedro II*, the teachers brought the debate to the public fiercely; it was still the only school to function based on the new structure.

For this article, it is necessary to understand whether Mello e Souza valued the debate. Thus, we used copies of the newspapers archived by the author in the Malba Tahan Fund of the *Centro de Memória da Educação*. These copies were underlined in some excerpts. The paragraphs highlighted by Mello e Souza are worth noting. Thus, in "*Os programas de matemática do Colégio Pedro II*"<sup>19</sup> (Fundo Malba Tahan, 02.003.0002-01), Joaquim I. de Almeida Lisboa points to the fact that:

Mathematics is the indispensable instrument for all inquiries into natural phenomena and economic phenomena themselves. Its economic field increases ever more, following the progress that the observational sciences are continuously operating. Mathematics teaching must also assume increasing importance in secondary schools as in higher education and be transformed with a continuous adaptation to the new needs of human society (Fundo Malba Tahan - 02.003.0002-01, our translation).

Almeida Lisboa was recognized as a more “traditional” teacher, and the form that the debate takes, from the bias of Mello e Souza, provides an image of what this writer and teacher accepted as relevant to the teaching of mathematics and science,

In *O ensino da matemática na escola secundária. Réplica ao sr. Professor Almeida Lisboa* written by Euclides Roxo<sup>20</sup>, the paragraphs highlighted by Mello e Souza point to two paths:

<sup>19</sup> Probably December 1930, in the *Jornal do Commercio*, Rio de Janeiro.

<sup>20</sup> Probably at the end of 1930 because Almeida Lisboa replied on January 4th, 1931.

Mr. Lisboa only had in mind to show the amazed children of Pedro II his vast culture ...

The simple competition can no longer be admitted as a recruitment process of secondary teachers ... it does not allow judging the methodological and pedagogical abilities of the candidate ... the 'Lisboa case' would be enough to demonstrate it rigorously.

One should always begin, in secondary school, with a *living and concrete intuition*, and only little by little can the logical elements [Felix Klein's advice] be brought to the fore.

Crime of which I am guilty, I perpetrated it, yes, martyring classes and classes of boys from 10 to 15 years old, with classes that were not within reach of their tender intelligence!

Crime of which I am remorseful, I practiced it, of course, but then I tried to get my 'arithmetic lessons' and the 'Algebra lessons' of professor Almeida Lisboa into the heads of those poor children, awakening in them the invincible horror for mathematics (Fundo Malba Tahan - 02.003.0003-01).

The first would be to draw attention to the impracticability of "putting algebra and arithmetic lessons in children's heads"; the second indicates what should be valued, that is, a "living and concrete intuition", bringing mathematics into the student's daily life. At the same time, he emphasized the importance of method and didactics, elements not valued in teacher tenders.

Finally, on January 18th, 1931, the excerpts selected by Mello e Souza pay attention to the importance of mathematics in everyday life, still emphasizing the perspective that the writer was fully inserted in the debate and the side that was due to him:

However, the belief that, because it is abstract, static, cold, and colorless, mathematics is separate from life, an illusory belief. Mathematics is not apart from life despite its highest degree of purity and abstraction.

It is just the ideal way of addressing life's problems, just as sculpture can idealize a human figure, poetry or painting can idealize a picture or a scene.

Mathematics is precisely the ideal handling of the problem of life and the central ideas of science. The great concepts about which it has built its majestic doctrines are precisely the primary ideas life must address and which give it interests and problems, order and rationality (Fundo Malba Tahan, 02.003.0011-01)<sup>21</sup>.

The teacher-writer clarifies the importance given to mathematics as something much more concrete than was usually thought. If the excerpts selected by Mello e Souza highlight what he considered relevant, there is no doubt about the side he chose. For him, it was important to understand mathematics as something routine in which intuition had a preponderant role. Mathematics did not occupy space in the first short stories signed as Malba Tahan, but this would change over the years, assuming a fundamental space in *O homem que calculava*. At this time, the pseudonym was largely related to Mello e Souza.

## From the first tales to *O Homem que calculava*

The book *O Homem que calculava* has been a resounding success since its first publication in 1938, which led to successive editions in 1938. There are changes concerning what had already been published, especially regarding the format and content – this work is a novel centered on the adventures of Beremis, an excellent “calculator”.

Is it possible to draw a parallel between the mathematical perspective of Mello e Souza and *O Homem que calculava*? How to understand *O Homem que calculava* and the short stories that the author had already published under the pseudonym Malba Tahan and in other works, such as *Céu de Allah* and *Lendas do oásis*? We intend to understand some meanings of this work in this small incursion into *O homem que calculava*, making it a kind of conclusion of the article.

The parallels with the tales are many. Like in the tales, *O homem que calculava* enters the walls of a “possible Orient”. The story takes place in Baghdad (most of the time), and the reader is taken by the narrator's descriptions – the “young Bagadli” he had met on the road to Baghdad. The interventions of a possible translator are noticed from the beginning. Thus, there is a footnote that this “Bagdali” is a person born in Baghdad” (Tahan, 1938, p. 11). These

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<sup>21</sup> “The teaching of mathematics in secondary school. Primary scopes of mathematics teaching to the purpose of the modern school” (Euclides Roxo, 18 jan. 1931, sem indicação de jornal).

interferences populate the entire work and, to a large extent, follow the same pattern as had been occurring in the short stories since 1923.

*O homem que calculava* turned out to be an effective work, unlike others cited in his short stories, such as - *Histórias Imitadas*, *Sorr-el-layal*, and *Tempo de guerra* - which could lead us to imagine the composition of a literary project of the writer since the 1920s. However, it is impossible to affirm that Mello e Souza even had a project drawn up. The novel could be a consequence of his previous works since the format was very similar but with the differential of being built as a narrative that united the various chapters. Such chapters taken separately could also be short stories (as they were years before).

Beremis, the "calculating man," was no ordinary man. This is present in several chapters: "intelligent Beremis" (Tahan, 1938, p. 13), "wit" (Tahan, 1938, p. 25), "great mathematician" (Tahan, 1938, p. 44 e 75), "mathematical ability" (Tahan, 1938, p. 47), showing erudition (Tahan, 1938, cap. XV, cap. XX), "exceptional man" (Tahan, 1938, p. 111). If, in some cases, there is a detailed explanation of the problem – as in the case of the division of the 35 camels (Tahan, 1938, capítulo III), which has a mathematical explanation in the final part of the novel (Tahan, 1938, p. 225, "notas") – other times the "calculator" manages to reach certain conclusions in a completely startling way – as in counting the leaves of a tree, the bees of a hive, the ants in the anthill (Tahan, 1938, capítulos I e II), of the number of fringes in the skirt of the twin ballerinas, in the exceptional explanations in the classes given to Telassim.

At the same time, "all are good calculators": "the fisherman who counts the fish carried by his net", "the soldier who evaluates the distance of a parasang with his eyes", "the poet who counts the syllables and measures the cadence of the verses", "the division of the bars" by the musician, and even a "humble basket worker who disposes of, one by one, of the hundred threads of his work" (Tahan, 1938, p. 82. our translation).

Throughout the book, there is tension between the need for a "calculating genius" to solve various problems that arise routinely and the idea that mathematics is everywhere and everyone has access to it. Similarly, "mathematics", "algebraist", "geometer", and "arithmetic" appear as synonyms in several parts of the novel<sup>22</sup>, making the same impression as Valente in

<sup>22</sup> Tahan (1938, p. 13, 68, 70, 75, 84-85, 92-93, 107, 121-122, 129).

saying that this is explained in the preface of *Mathematica: 1º ano*, in which Mello e Souza translates the “fusion of arithmetic, algebra, and geometry - by ‘confusion’”.

In other words, while Mello e Souza followed the debates and seemed to position themselves in favor of the changes, in practice, they did not occur in such an evident way, and this is made explicit even in a book like *O homem que calculava*, who does not fail to quote the work of Euclides Roxo more than once (*A matemática na educação secundária*, de 1937) in which, according to Miorim (1998, p. 92, our translation), “the defense of modernization appears on every page”.

There seems to be a conflict in the pages of the novel, both concerning the need for an “excellent calculator” to intervene in everyday problems and the definition of mathematics itself. This variation condenses the movement of Mello e Souza in the debate that converges, sometimes to intuitive and easy mathematics, sometimes to the idea of “confusion”.

*O homem que calculava* reveals, in the realm of fiction, Mello e Souza's view of the disputes surrounding the meaning of mathematics. At the same time, it brings the teacher closer to the fictional works signed as Malba Tahan by focusing on mathematics. It would not be for nothing that it would become his most outstanding work, with successive editions over the decades and translations into several languages.

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