

THE SHREW AND THE SHREWD: MACHADO DE ASSIS'S *LIÇÃO DE BOTÂNICA*

ANNA-LISA HALLING

Brigham Young University
Provo, Utah, Estados Unidos

Abstract: Machado de Assis's play *Lição de botânica* (1906) transforms William Shakespeare's chauvinistic play *Taming of the Shrew* (1590-1592) into an entertaining exercise in feminist thought through the inversion of gender roles. As in Machado's novels, the female characters in *Lição* become agents, acting rather than being acted upon by others. By creating strong, smart, independent female characters and contrasting them with an awkward and accidentally humorous male character, Machado undermines misogyny and endorses feminist ideals.

Keywords: *Lição de botânica*; *Taming of the Shrew*; feminism; theater; intertextuality.

DE MEGERA A FEMINISTA: A LIÇÃO DE BOTÂNICA DE MACHADO DE ASSIS

Resumo: *Lição de botânica* (1906), uma peça de teatro de Machado de Assis, transforma a obra chauvinista de William Shakespeare, *Taming of the Shrew* (1590-1592), em um divertido exercício feminista por meio de da inversão de papéis de gênero. Como nos romances de Machado, as personagens femininas são agentes; agem em vez de receber a ação de outros. Ao criar personagens femininas que são fortes, inteligentes e independentes e ao contrastá-las com um desajeitado e acidentalmente humorístico personagem masculino, Machado enfraquece a misoginia e fortalece os ideais feministas.

Palavras-chave: *Lição de botânica*; *Taming of the Shrew*; feminismo; teatro; intertextualidade.

While Machado de Assis is universally recognized as one of Brazil's most influential novelists, critics typically do not extend their admiration to the other genres with which he experimented. Machado's poetry has been habitually ignored, as have his dramatic works. In spite of Machado's literary prowess and acumen as a theater critic, past scholars generally perceived him as lacking the talent to author his own convincing theatrical pieces. This perception was evidenced, in part, by the reaction of the author's contemporaries to his plays.¹ As we know, Quintino Bocaiuva, a close friend of Machado, pens a brutally blunt personal letter in response to his reading of the playwright's drama. In this correspondence, Bocaiuva (2008, p. 22) insists that the public has a right to expect much from his talented friend but that sadly Machado's theatrical works are "frias e insensíveis, como todo o sujeito sem alma." Adding insult to injury, Bocaiuva declares that Machado's works are to be read and not performed. No critic could utter a more damaging phrase to any playwright, since performance is the essence of theater, and writing plays that are destined for performance but unstageable is akin to composing a symphony that no one will ever hear—an exercise in futility.² In spite of Bocaiuva's oft-repeated dismissal of the author's dramatic works, Machado's plays exhibit a variety of themes and literary strategies that also appear in Machado's narrative works, including his well-documented interest in intertextual appropriation.

Historically, the critics' generally accepted argument has been that Machado is at his best when sticking to prose.³ As Joel Pontes (1960, p. 11) insists, "o estudo de Machado de Assis como teatrólogo é inglório." Nevertheless, within the last decade, these attitudes have begun to change. Modern scholars are beginning to recognize not only the literary value of Machado's drama but also the value of studying the author's entire oeuvre. For example, Silviano Santiago argues that

¹ *O caminho da porta* and *Protocolo*.

² Although most theater is written specifically for performance, it is true that closet dramas (a niche theatrical genre) were meant only to be read aloud. *Lição* is not a closet drama, however, as Machado wrote his plays for the stage.

³ One notable exception was Ruggero Jacobbi, who directed a play titled *Brasil Romântico*, a combination of *Lição de botânica* and *O Primo da Califórnia*, by Joaquim Manuel de Macedo. Jacobbi insisted that the dialogue in Machado's play was "um dos mais brilhantes, dos mais dinâmicos, dos mais cheios de nuances irônicas e do sentido vivo da realidade, que se possa conhecer na literatura" (JACOBBI, 1962, p. 59).

Já é tempo de se começar a compreender a obra de Machado de Assis como um todo coerentemente organizado, percebendo que à medida que seus textos se sucedem cronologicamente certas estruturas primárias e primeiras se desarticulam e se rearticulam sob forma de estruturas diferentes, mais complexas e mais sofisticadas. (SANTIAGO, 200, p. 27)

Although in recent years more scholars have focused their critical attention on Machado's theater, very few have examined the play that will be discussed hereafter.⁴ In spite of a general lack of interest in Machado's theater, critics have given considerable attention to Machado's interest in theater, though primarily in the ways that Machado appropriated theater from other literary traditions into his prose. As K. David Jackson points out,

Machado's early involvement in the theater and opera, his own original plays and translations, may not have left a lasting influence on Brazilian theater... yet the theater and opera, their atmosphere, characters, and conventions, were a constant and profound presence that left an indelible mark on his fiction, visible in every major work throughout his career. (JACKSON, 2015, p. 151)

Indeed, the intertextuality of Machado's texts is a common thread among many works of criticism. For example, João Roberto Faria's (2006) article "Machado de Assis, leitor de Musset" and João Cezar de Castro Rocha's (2005) edited volume *The Author as Plagiarist: The Case of Machado de Assis* explore the ways that Machado used, adapted, and responded to a wide array of literary texts. A number of critical works focus specifically on Shakespeare, such as Helen Caldwell's (1960) famous study *The Brazilian Othello of Machado de Assis*. Other more recent studies include Adriana da Costa Teles's (2017) *Machado e Shakespeare: Intertextualidades* and Stélio Furlan's (2017) "De Desdêmona a Capitu: Machado de Assis lê Shakespeare." Teles (2017, p. XIII-XIV) notes that

⁴ One notable exception is Earl Fitz (2016). Surprisingly, Machado's *Lição de botânica* seems more popular in the field of science than in the study of literature. This play has been included in several articles and studies centered on utilizing literature as a tool for science pedagogy. Some of these are Simone Rocha Salomão (2008), Thelma Lopes Carlos Gardair and Virginia Torres Schall (2008; 2009), Leonardo Maciel Moreira and Martha Marandino (2015), Priscilla Pinheiro Machado and Wellington Rodrigues de Matos (2012) and Cecília Maria Goulart, Dominique Colinvaux, Simone Rocha Salomão (GOULART et al. 2003). Salomão's dissertation also utilizes the play as a "fio condutor [...] a partir da qual são geradas questões para a discussão teórica e caminhos para a pesquisa empírica" (SALOMÃO, 2005, p. vi).

"Machado constrói uma intertextualidade sofisticada e minuciosa com a produção do autor inglês, resgatando e reinventando personagens e situações criadas por ele." Such comparative readings of Machado reveal new insights into his oeuvre and make room for the exploration of points of contact between Shakespearean and Machadian drama.

One such point of contact is Machado's play *Lição de botânica* (1906), which contains clear echoes of (and responds to) one of Shakespeare's most (in)famous works, *Taming of the Shrew* (1590-1592). In his biography of Machado, Earl Fitz (1989, p. 14) not only observes the effects of Shakespeare on Machado's writing but also rightly praises "the genius of Machado," which "lies in his ability to synthesize, to take certain features of different writers and thinkers and combine them in new and startling ways, which in their transcendent originality make Machado's work distinctive." *Lição* manifests precisely this Machadian technique of synthesizing in order to create something original. This comparative study of *Lição de botânica* and *Taming of the Shrew* (SHAKESPEARE, 1988) reveals the creation of strong female characters who defy the patriarchal society in which they operate while asserting their subjectivity and authority. In *Lição*, Machado modifies and transforms Shakespeare's blatant misogyny in order to create a tribute to the intelligence and perception of women. Fitz (2015, p. 1), in his book on female characterization in Machado's prose, argues that "Machado's women were... critical to his aesthetic and theoretical concerns..., to his sociopolitical concerns, and to his explorations of human (and especially female) motivation and desire." Moreover, Fitz (2015, p. 3) insists that Machado designed his female characters "to serve a very specific purpose and not one dependent on the male characters who surround them." As in his novels, the women in *Lição* become agents, acting rather than being acted upon by others. Machado rewrites *Taming*, turning it on its head through the inversion of roles. By creating strong, smart, independent female characters and contrasting them with an awkward and accidentally humorous male character, Machado undermines misogyny and endorses feminist ideals.⁵

⁵ June E. Hahner (1980) argues that the feminist movement in Brazil began in earnest in the middle of the nineteenth century, approximately fifty years before the publication of this play. Machado's text follows a pattern set forth by many works in which authors proclaim the virtues of women, advocate for inclusion in traditionally masculine spheres (particularly education), and treat women as subjects rather than objects. These works date back to the Middle Ages and early modern period and include texts, such as *Cristine de*

In *Lição*, Machado presents two sisters, Helena and Cecília, who align with Shakespeare's Katherine and Bianca, respectively. In both cases, the younger sister has a viable and desired suitor whom her guardian does not allow her to marry due to some aversion or impediment to marriage. *Taming* reveals that Katherine's unacceptable behavior has kept all suitors at bay and that her father refuses to allow Bianca to marry unless her older sister does so first. In *Lição*, the opposition to the marriage between two young lovers (Cecília and Henrique) also stems from the rather arbitrary and capricious wishes of a male guardian, Baron Sigismundo. The aristocrat secures his nephew's career path by forbidding his union to Cecília. The question of marriage shapes the characterization of both Shakespeare's Katherine and Machado's Helena. The reactions of the female characters to matrimony varies. Shakespeare portrays Katherine's aversion to matrimony as resulting from her exigent and demanding nature. Conversely, Helena, a young widow, articulates her express intention not to remarry as she is completely satisfied with her lot in life, despite her loss. When her sister suggests that suitors may seek her out ("as joias querem o teu coração"), Helena insists that she will only disappoint ("Tanto pior para elas: não de ficar na casa do joalheiro" [ASSIS, 1938, p. 355]). This difference in the presentation of the two women means that Shakespeare can easily label Katherine as shrewish, a clearly negative epithet, while Machado portrays Helena as shrewd, an admirable quality.

Although the trope of marriage proves essential in both plots, the timing of the actual formalization of the rite differs in each. In *Lição*, the respective unions between Cecília and Henrique, and between Helena and the baron, are certainly implied, but they do not occur within the time of the play. In fact, the spectator cannot even be sure whether or not they will occur. In *Taming*, however, the marriage ceremony is a pivotal moment in the text upon which the rest of the plot is predicated. The act of marriage is also intrinsically linked to the transformations of characters in both works. Tellingly, the abrupt metamorphosis undergone by Katherine in *Taming* does not occur for Helena in *Lição* but instead for the baron. While her nature remains unchanged, Helena does seem to revise her position on the possibility of remarrying. Nevertheless,

Pizan's *The City of Ladies* (1404), Marguerite de Navarre's *Heptaméron* (1599), the anonymous *The Woman's Sharpe Revenge* (1640), Marie de Gournay's *Egalité des hommes et des femmes* (1622), Anne Marie van Schurmann's *On the Capacity of the Female Mind for Learning* (1640), Margaret Cavendish's *Poems and Fancies* (1653), and Mary Wollstonecraft's *A Vindication of the Rights of Woman* (1792).

even this small shift is almost imperceptible and certainly not guaranteed, as evidenced by the open-ended nature of the text. In fact, Helena's characterization precludes her from such drastic alterations, since any major transformation in her nature would weaken the storyline. Although the strong-willed Helena does not undergo a major change comparable to Katherine's, Machado's play still exemplifies what Lawrence Danson (1986, p. 220) has noted about *Taming*, that it "requires a central character to undergo an overnight identity crisis and (perhaps) emerge transformed." Unlike in Shakespeare's play, the altered character in *Lição* is male. Helena notes the dramatic change effected in the baron when he laments his decision to choose science over love. She acknowledges him for the first time as an "homem" (as opposed to the repeated epithet "urso"), remarking, "até aqui eu só via o sábio." (ASSIS, 1939, p. 386) While Katherine's alteration stems from her dehumanization at the hands of Petruccio, the baron's conversion is a direct result of the humanizing influence of Helena. Were it not for Katherine and the baron's respective transformations, both plots would stagnate and could not end in a comedic resolution.

These characters' conversions highlight not only elements of plot but of characterization as well. Shakespeare lived in a society that certainly tended towards, and even encouraged, the marginalization, devaluing, and subjugation of women, which accounts for his misogynistic portrayal of women in *Taming*. Shakespeare's characters perceive Katherine as dangerous precisely because she does the unthinkable by appropriating for herself certain characteristics that during the early modern period were meant only for the male sector of the population. The men around her label her a shrew because of her unwillingness to conform to the expectations of the patriarchy in which she lives, and they employ this epithet in order to combat her nonconformity, assuage their fears, and assert their masculine dominance over her. If she cannot be controlled, then male authority is called into question and the foundations of (patriarchal) society are in peril. If Shakespeare had written Katherine as a male character, she may very well be labeled a tyrant, but a spectator would likely not have considered her behavior to be unworthy of her sex. In fact, her quick wit, insulting language, and physical attacks could even be interpreted as symbols of authority and control were she in an accepted position of power within the

patriarchy. Cross would become stern, heavy-handed would become firm, and shrew would become shrewd.

In contrast, this type of gendered double standard is completely absent from Machado's work. Shakespeare utilizes his male characters to chastise and punish Katherine for her independence. Conversely, Helena demonstrates her quick thinking and intelligence without receiving any kind of reproach, in part because the patriarchy has no permanent presence within her home. Here, no father, brother, or uncle exercises his influence over the women in the house. In both *Lição* and *Taming*, the presence of the patriarchal society in which the characters must operate is emphasized and metonymically represented by a male authority who forbids the marriage of the younger sister to her preferred suitor. Here, the man, and not the woman, is kept from his love interest. Although the patriarchy does not operate within the Helena's household, it makes itself known in other ways. Indeed, the baron attempts to impose it on the members of the family by endeavoring to dictate their actions. Humorously, this character's dialogue serves to mock the patriarchal hierarchy that he represents. He notes with pride, "o tio de meu tio foi botânico, meu tio botânico, eu botânico, e meu sobrinho há de ser botânico. Todos somos botânicos de tios a sobrinhos." (ASSIS, 1939, p. 358) Rather than passing from father to son as would a monarchy, this particular chain of command is humorously created among uncles and nephews, since a true dedication to all things scientific must necessarily preclude progeny. The baron's commentary borders on the nonsensical and parodies the social power passed down through the generations from one male to another.

A comparison of the male characters in both plays also reveals Machado's adept espousal and transformation of Shakespeare, particularly when contrasting Machado's baron with Katherine's brutish suitor. As opposed to the shallow Petruccio, who utilizes marriage to achieve his own selfish goals, Baron Sigismundo rallies loudly against marriage, claiming that such a union would forever stunt the progress and learning of a scientist such as himself. Science rules his life, guides his decisions, and takes precedence over human emotion. Utilizing an extended metaphor, he describes the ideal academic life, declaring, "eu desposei a ciência. Saber é o meu estado conjugal; os livros são a minha família. Numa palavra, fiz voto de celibato." (ASSIS, 1939, p. 359) His successful intellectual pursuits even free him from monetary temptations that might entice

him into a conjugal arrangement with a well-to-do widow. Unlike Petruccio, the baron possesses no financial motivation to enter into a marriage contract with Helena. In fact, in his aversion to marriage and his disdain for others who do marry, he more closely resembles Katherine than her suitor. Helena, in turn, is something of a kinder, gentler version of Petruccio. After spending less than half an hour with her, the baron admits for the first time in his thirty-nine years that "A ciência não é tudo." (ASSIS, 1939, p. 388) In contrast to the clever banter of *Lição*, physical violence is implicit in *Taming* even before Petruccio meets his bride and makes it explicit. Although Helena shows the baron the error of his ways in order to win him over for the sake of her younger sister, she does so through temperate persuasion and benign maneuvering rather than through corporal punishment and verbal abuse.

Helena's quick wit is underscored at various points throughout the play. For example, when Cecilia talks about Henrique in an overly familiar manner (she addresses him by his first name) and thus shocks the sister's aunt, Leonor, Helena quickly covers up the slip, deftly changes the subject, and then proceeds to initiate a metatheatrical plot meant to facilitate the romance between Cecilia and the baron's nephew, Henrique. She begins by attempting to convince her stubborn aunt to allow the baron to visit. When this fails, Helena seizes an unexpected opportunity to subtly convince the baron to visit her under the guise of botany lessons. When the baron accidentally leaves a book on botany at the house, Helena uses the text as a pretext to win the baron over through clever machination. When he returns to retrieve his reading material, her show of feigned knowledge and contrived interest in the subject deeply impresses Baron Sigismundo.

In fact, Helena's admiration of the book's contents elicits the first emotional response from the aloof baron. When Helena declares botany to be the best of all the sciences, he declares "*com calor*" that it is "a primeira em todas." (ASSIS, 1939, p. 369) As the conversation continues, Helena proves able to understand French, shows at least a basic knowledge of certain plants and flowers, and demonstrates an impressive ability to philosophize about the supposed incompatibility of love and science. It is clear that she can not only hold her own against the baron, but also best him at his own game of logic. Her intelligence and assertiveness eventually win over the scientist and stand in opposition to Katherine's eventual domestication and subjugation. Both

Machado's and Shakespeare's plays make use of the classical motif of love as teacher through a male figure who attempts to educate his female counterpart. In *Taming*, this instruction suppresses the student. In *Lição*, love teaches the teacher.

Characterization proves to be an important point of departure for the comparison of the role of women in both plays, along with their agency and level of autonomy. As far as *Taming* is concerned, Katherine's characterization is based primarily on her initial unwillingness and eventual willingness to be submissive to the expectations and norms of the patriarchy. Only if we accept Shakespeare's societal norms should we see her resistance as inappropriate. Otherwise, we recognize the misogynous nature of such a characterization. In stark contrast, Helena, Katherine's more fortunate counterpart, is not portrayed as shrewish in the least, despite her outspoken nature and her constant metatheatrical control of the plot. Nor does Machado ever represent her as submissive. Although our modern sensibilities might inform us that her possible marriage to the baron evidences a certain kind of submission, this possible union is not portrayed as one of uneven domination, but rather as a partnership of equals.⁶

Helena's control of the situation raises the issue of female subjectivity and autonomy. While she ultimately guides the plot as a sort of meta-playwright, this does not keep the baron from making his own decisions and coming to his own realizations. Helena is able to exercise her own agency without impeding that of those around her. On the other hand, Katherine, subjected first to the will of her father and immediately afterwards to the volition of her tyrannical husband, gradually loses the ability to act as others increasingly act upon her. Katherine's transformation has more to do with self-preservation than with an

⁶ As a widow who is financially independent, Helena has no need to marry. Rather, any decision to do so would be her own. Although she functions within a patriarchal societal structure, Helena is clearly capable of making decisions based on her own subject position and perspective. Furthermore, Machado leaves the question of marriage open-ended. Helena may very well decide not to marry at the end of her self-imposed three-month waiting period. Nísia Floresta, considered to be Brazil's first feminist, published her *Direitos das mulheres e injustiças dos homens* (argued to be either a loose translation of Wollstonecraft's text or a direct translation of the 1739 treatise *Woman not Inferior to Man*) in 1832. In terms of marriage, Charlotte Hammond Matthews points out that Floresta "advocates an active role for women within marriage" (MATTHEWS, 2012, p. 76) and casts matrimony "within an empowering rhetoric" (MATTHEWS, 2012, p. 77) while condemning only inequality between sexes and not marriage itself. Although some second-wave feminists may have seen marriage as acquiescing to the patriarchy, contemporaneous feminist thinkers saw it as a locus where equality between men and women could be achieved.

actual shift in personality and demeanor. Her full capitulation to Petruccio's will manifests itself in Katherine's willingness to obey her husband simply to be free of his intolerably bad behavior. Worst of all, Petruccio makes her an instrument of the patriarchy, commanding her to chide other wives for their independent-minded behavior. He clearly crushes her spirit and reduces her to the equivalent of an obedient and servile domestic, no more an equal to her husband than a lap dog to its master. Katherine discovers that she must repress her independence and knowledge and submit to Petruccio's will in order to survive in her new environment.

While *Taming* squashes Katherine's rebellious independence, *Lição* conversely celebrates Helena's autonomy, allowing it to work as a force that first drives the action and ultimately resolves the plot. In fact, even in the crucial moment when the baron cannot find his voice in order to ask for permission to marry his intended, Helena appropriates his speech (and not for the first time) by declaring, "Acabo eu. O que o Sr. Barão deseja é a minha mão." (ASSIS, 1939, p. 392) Even so, she subsequently refuses to give the baron an immediate answer to his request for marriage, explaining that she will make her decision in three months. When lamenting her imposition of a waiting period, he asks if he will experience "a felicidade ou o desespero" (ASSIS, 1939, p. 393) after those ninety days. She elides responsibility in the matter by explaining that his happiness is in his hands, and not hers. Thus we see that Helena simultaneously reaffirms her own autonomy while asserting the baron's independence. She is neither to be congratulated nor faulted for the actions, feelings, or attitudes of anyone other than herself. This independence of character marks Helena in particular as an agent who does not allow others to act upon her. Katherine attempts this kind of self-actualization, but is eventually forced to submit her will to that of her husband and the male-dominated society he represents in order to survive. Shakespeare contains while Machado frees.

When considered in comparison, critics may deem Shakespeare's creation superior to that of Machado. However, despite the supposed theatrical inferiority of Machado's piece, *Lição* showcases the author's extremely successful endeavor to shape something unique in this synthesis of old and new elements. He breathes new life into classical tropes and amazingly transforms Shakespeare's reveling in the domestication of women into a celebration of their intellect and agency. As Fitz (2016, p. 130) elucidates in his article on *Lição*,

these female characters do not seek “to dominate men as the strong dominate the weak, but [are] clear-minded advocates of the need to share power equally.” In *Lição*, Machado shifts the balance of power in favor of the female characters while portraying in a positive light the same characteristics that Petruccio seeks to destroy in *Taming*—determination, decisiveness, strength, and fortitude. Helena represents what Katherine might have been if not for the ever-present and oppressive influence of the male-dominated society in which she operates. Had her strengths been valorized rather than vilified, the other characters and the audience might have seen fit to label her as shrewd rather than a shrew. Helena, then, is Katherine rescued and refitted for a more modern, equal world.

Perhaps, like what Machado does for Katherine, we can yet rescue and refit the theater of Machado de Assis. Although some may not value works such as *Lição* for their worth as performable pieces, *Lição* itself has a better track record than most. It has not been performed frequently, but a few theater companies have staged it within the last seven decades (São Paulo’s Teatro Íntimo Nicette Bruno, 1953 [under the title *Brasil Romântico*]; Rio’s Teatro Municipal, 1956; Escola de Teatro Ozanan, 2005; Teodora Lins e Silva Companhia de Teatro, 2006; Teatro Humboldt, 2010; Cia de Teatro Hierofânico, 2011; Grupo de Teatro Estrada, 2011; Mostra Atos Teatro, 2011). We should consider works such as *Lição* as manifestations of the author’s literary genius and his ability to synthesize other texts in order to create something unique. Furthermore, by analyzing *Lição* in light of Shakespeare’s *Taming*, we gain unique insight into Machado’s social and moral sensibilities. Only Machado de Assis, a literary virtuoso and an astute student of the human experience, could have adapted and transformed Shakespeare’s most chauvinistic play into such an entertaining exercise in feminist thought.

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ANNA-LISA HALLING is an assistant professor of Portuguese at Brigham Young University where she teaches courses on Portuguese culture as well as Portuguese and Brazilian literature. Her recent publications include "Upending Hegemonic Masculinity in Soror Maria do Céu's *Clavel, y Rosa*" in the *Journal of Lusophone Studies* and "Space, Performance, and Subversion in Soror Violante do Céu's *Villancicos*" in *Comedia Performance*. Dr. Halling's research interests include theater, performance criticism, spatial theory, feminist theory, and early modern Iberian convent literature. E-mail: halling@byu.edu

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