Carnival as Unifying Performance in Rio de Janeiro

A thesis submitted in partial fulfillment of the requirements
For the degree of Master of Arts in Theatre

By Raquel Rahal Lenhart

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PREFACE

Carnival in Brazil is a fantastic theatrical event that takes place in every single town—big or small—in every single year. “Have you ever been to Carnival?” is the question that I am most frequently asked regarding life in Brazil. At first, I thought that friends were joking since they know that I was born and raised in Brazil; I am always sincerely puzzled when people ask me such a question. As “dramatic” as it sounds, asking Brazilians if they have ever been to Carnival is like asking them if they breathed oxygen while living in Brazil. I realize now, however, that the question is actually whether I have ever been to Carnival in Rio de Janeiro—not just “any” Carnival. In fact, people from around the world do not typically even know about the other smaller Carnivals which occur within each city in Brazil. Why would they? Carnival in Rio de Janeiro is the Carnival most talked about, displayed, and mediated in the world. Clearly people were asking me about the Carnival, one of the largest popular theatre performance events on the globe.

I was born and grew up in Ribeirão Preto, a city in the state of São Paulo of about one million inhabitants, where I performed in Carnival every year until I moved to Australia as an exchange student, and subsequently to the United States where I currently reside. My family and I always wanted to attend Carnival in Rio de Janeiro; however, due to logistics, we settled for watching it on television every year. When reminiscing about my own experiences, I recall growing up with the details of Carnival performance in the private clubs. Although I never considered myself “elite” (and still do not), it is now clear that I never knew the real “lower-class” Carnivals on the streets.
I was about three-years old when I performed in my first club Carnival. There was a matinee Carnival for families and an evening Carnival for adults. The latter would last all night. When I became a teenager, I would perform in the matinee Carnival, go home and sleep for a few hours, and then perform at the evening Carnival—all night long. At about 7:00 am, I would go home and sleep for a couple of hours and then return for another matinee performance. My friends and I would rinse and repeat for another three days. The matinees only happened on Sunday and Tuesday, whereas the evening Carnival took place Saturday through Tuesday, ending just before Ash Wednesday. Carnival in Brazil, considered by the Catholic Church to be a pagan celebration, required Brazilians to appear in church on Ash Wednesday to “rid ourselves of the sins” we had committed by participating in this highly theatrical event.

Although this Carnival party-triathlon seems exhausting to many human beings, my friends and I would always spring out of bed to get ready for the next day’s Carnival performance adventure. We put on our theatrical costumes, “stage” make-up, and fixed our hair according to the theme represented by our dancing and costumes. Four days and very little sleep later, it was back to our normal lives.

Presently, thanks to social media and technology, I follow Brazilian Carnival very closely from afar. Moreover, with the help of my family who still lives in Brazil, I hear firsthand of what is transpiring in Carnival—in Rio de Janeiro and in the other towns. Admittedly, I often play Carnival music at my home in Los Angeles; I dance, sing, and reminisce about my past performances. Since I have “lived and breathed” Carnival all my growing years and I am currently engaged with performance in the academic community, I hope to shed some light on the cultural and social significances of Carnival. I will
analyze this theatrical event from the unique perspective of native-participant scholar
who has lived Carnival—on-site and remotely—for many years. My professional
experiences as a theatre producer, actress, dancer, and singer are helpful when exploring
all facets of Carnival theatricality; these experiences provide me with the expertise to
dissect Carnival’s extraordinary performances and storytelling.

Note on translation: All English translations of Portuguese expressions are mine, unless
otherwise indicated.
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DEDICATION

I would like to dedicate this thesis to my whole family who has sacrificed hundreds of hours to make this possible.

To my wonderful and loving husband Michael Lenhart, who has always been my cheerleader and great supporter, and for holding down the fort while I spent countless of hours locked in my office to make this happen.

To my beautiful and smart daughters Julianna Lenhart and Brianna Lenhart, whom I dedicate not only this thesis, but also my entire existence to.

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# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copyright</td>
<td>ii</td>
</tr>
<tr>
<td>Signature Page</td>
<td>iii</td>
</tr>
<tr>
<td>Preface</td>
<td>iv</td>
</tr>
<tr>
<td>Acknowledgement</td>
<td>vii</td>
</tr>
<tr>
<td>Dedication</td>
<td>ix</td>
</tr>
<tr>
<td>List of Figures</td>
<td>xi</td>
</tr>
<tr>
<td>Abstract</td>
<td>xii</td>
</tr>
<tr>
<td>Introduction</td>
<td>1</td>
</tr>
<tr>
<td>Chapter 1: History of Carnival</td>
<td>16</td>
</tr>
<tr>
<td>Carnival in Rio de Janeiro</td>
<td>16</td>
</tr>
<tr>
<td>Development and Unique Aspects of Carnival in Rio de Janeiro</td>
<td>18</td>
</tr>
<tr>
<td>Rio’s Samba Schools</td>
<td>24</td>
</tr>
<tr>
<td>Samba Music and Samba Dance in Carnival</td>
<td>26</td>
</tr>
<tr>
<td>Performance Components in the Samba Schools</td>
<td>32</td>
</tr>
<tr>
<td>Storytelling in Carnival Performances</td>
<td>41</td>
</tr>
<tr>
<td>Chapter 2: Aesthetic, Structural, and Unifying Aspects of Rio’s Carnival</td>
<td>47</td>
</tr>
<tr>
<td>Rules that Govern Rio’s Carnival</td>
<td>47</td>
</tr>
<tr>
<td>Costumes, Allegorical Cars, and Other Visuals Elements</td>
<td>50</td>
</tr>
<tr>
<td>The Exploitation of Women Performers</td>
<td>54</td>
</tr>
<tr>
<td>Rio de Janeiro’s Carnival Tourism</td>
<td>63</td>
</tr>
<tr>
<td>Chapter 3: Commercialization of Carnival in Rio de Janeiro</td>
<td>72</td>
</tr>
<tr>
<td>The Impact of Commercialization on Storytelling and Performance</td>
<td>72</td>
</tr>
<tr>
<td>Competition and Its Commercial Impact Upon Carnival</td>
<td>76</td>
</tr>
<tr>
<td>Chapter 4: Contemporary Developments in the Carnival Culture</td>
<td>84</td>
</tr>
<tr>
<td>The Benefits of Commercialization</td>
<td>84</td>
</tr>
<tr>
<td>Carnival Performance in the Conventional Theatre Context</td>
<td>92</td>
</tr>
<tr>
<td>Conclusion</td>
<td>95</td>
</tr>
<tr>
<td>Works Cited</td>
<td>105</td>
</tr>
</tbody>
</table>
# LIST OF FIGURES

1. A typical allegorical car preceded by Samba School performers  
   [Page 4]
2. Drawing of *entrudo* Carnival in Rio de Janeiro  
   [Page 19]
3. *Sambódromo* view from the higher seats’ perspective  
   [Page 34]
4. Panoramic view of *Sambódromo*  
   [Page 34]
5. *Instrumentalistas* performing for their Samba School  
   [Page 36]
6. *Mestre Sala* and *Porta Bandeira* performing for their Samba School  
   [Page 37]
7. *Destaques* perform for their Samba School on top of the allegoric car  
   [Page 38]
8. *Baianas* performing for their Samba School  
   [Page 39]
9. Side view of an allegorical car in Rio de Janeiro’s Carnival  
   [Page 40]
ABSTRACT

Carnival as Unifying Performance in Rio de Janeiro

By

Raquel Rahal Lenhart

Master of Arts in Theatre

Brazilian Carnival of Rio de Janeiro is a monumental performative festival that provides what Victor Turner refers to as “liminal time and space,” in which both participants and audiences alike can revel and "perform." During Carnival days, Brazilians of different races or social classes come together and temporarily live as the Other. This Other reflects a period of pure happiness when Carnival enthusiasts can temporarily forget their problems and create an alternate ethos for Brazil. This thesis critically analyzes Brazil’s Carnival of Rio de Janeiro and its cultural implications. Through the inspection of past and present productions, this thesis traces how commercialization affected the evolution of Rio de Janeiro’s Carnival in the past century. Chapter 1 studies the history of Carnival, featuring Carnival in Rio de Janeiro, Samba Schools, their components, storytelling and productions, Samba Music, and Samba Dance. Chapter 2 explores the aesthetic, structural, and unifying aspects of Rio de
Janeiro’s Carnival, including an analysis of the rules that govern Rio’s Carnival. This chapter also analyzes costumes, allegorical cars and other visual elements. In addition, Chapter 2 discusses the exploitation of women performers as well as the impact of tourism in Rio’s Carnival. Chapter 3 studies the commercialization and competition effects on Rio de Janeiro’s Carnival, including influences on storytelling and performance. Chapter 4 discusses the benefits of commercialization activism and the connections between conventional theatre and Carnival of Rio de Janeiro. The conclusion upholds the significance of Carnival in Rio de Janeiro in that it epitomizes the essence and spirit of Brazilians by unifying individuals of all walks of life, reaffirming their resiliency and representing their alternate “Carnival” ethos.
INTRODUCTION

It is well-known that the Carnival in Rio de Janeiro is the largest of all Carnival celebrations in the entire country—the greatest and most authentic national performance in Brazil (Germâno 131). As one of the leading Carnival scholars, Maria Isaura Pereira De Queiroz asserts, Brazilians pride themselves in calling Brazil “the Carnival country” (12). However, Carnival is not just a Brazilian event. It is celebrated throughout Europe and Latin America, including the Caribbean Islands of Trinidad and Haiti, as well as in the South American countries of Colombia, Bolivia, and Ecuador. Furthermore, Carnival is celebrated in North America under the title of Mardi Gras in New Orleans; Carnival in Hollywood, California; and Fat Tuesday in the Deep South United States communities from Texas to Florida (García). Brazilians who live abroad also create and celebrate their own Carnival all over the world. For instance, I have participated in Carnival events in Los Angeles, whose Brazilian residents produce, perform, and revel in Carnival every year.

Before delving into this thesis, some definitions must be clarified. First, what is Carnival? Eneida de Moraes, a pioneer Carnival researcher, explains that the word carnival has been defined by different scholars. The Romans claimed that the word carnival came from *carrum novalis* (chariot ship), which was a float-like device used as an opener for their festivities (25). Others assert that the word carnival comes from *caro-vale* (goodbye to the meat), since it marks the beginning of Lent. In Latin, the term *carnem-levare* (“abandon meat”) was adopted and shorted by the Italians as *carnevale* (flesh farewell), and then later translated by Spanish and Portuguese as *carnaval* (Mauldin 3; Araújo 69). There is much scholarly debate regarding the birth of Carnival;
hence, the origins of Carnival are somewhat controversial. If you would ask the average Brazilian where Carnival came from, my guess is that they would answer that it came from Rio de Janeiro, and they would probably give you a “spicy” look as to why you are asking them such an obvious question. The truth is that Carnival, as most scholars argue, began much earlier than Carnival in Rio de Janeiro.

Brazilian scholar Hiram Araújo breaks down Carnival into three phases. The first phase, he calls it “Original Carnival,” claiming that this type comes from agricultural cults starting in Egypt ten thousand years before Christ, where people used to sing and dance around a bonfire (35-39). Eneida de Moraes agrees with Araújo’s time line assessment and further asserts that old texts declare that Carnival had its roots in the agricultural rituals practiced by the prehistoric folks (21). The second phase of Carnival, Araújo argues, is the pagan Carnival that developed in Greece and Rome starting around the Seventh century before Christ. This pagan Carnival, due to the pressures of social hierarchies, led to libertine performances where people used sex, including orgies, and alcoholic drinks to escape their current life problems (41-48). In Rome, businesses, schools, courts or any type of commerce closed down for the day so that everyone could perform, including the slaves, who on Carnival day, could “evade” their social class divisions, even being allowed to ridicule and insult their owners (Moraes 21). The slaves would “take place” of their owners and would go on the streets to celebrate equality between men, singing and enjoying themselves during the days of Carnival (Araújo 49). According to Mauldin, it is believed that Greeks and Romans performed in their first Carnival in the early twelfth century. A recorded Roman text depicts a parade watched by the Pope and by Roman citizens through the city, which was celebrated right before Lent.
The last phase of Carnival, according to Hiram Araújo, is the Christian Carnival developed when the Catholic Church sanctioned Carnival from 590 CE until the Renaissance epoch. This phase of Carnival took place in European cities such as Nice, Rome, and Venice, and it later spread all over the world (51-61). It is well-documented by scholars that these Carnival festivals gradually spread to other European countries such as Portugal; by the fourteenth century, Carnival became a common practice and a well-established boisterous performative tradition (Mauldin 3). Marking the approach of Lent and the change from winter to spring, Carnival was a ritualistic and secular event that used masquerade, allegorical floats, and play (3). Allegorical floats refer to truck-like vehicles (either motorized or non-motorized) that are highly decorated, presenting a story or a theme in a parade or festival (see fig.1). These allegorical cars have become more intricate and expensive each year. Also featuring elaborate costumes, many scholars consider this Christian Carnival to be the “true” Carnival (Araújo 51-61).
Within this debate, one fact is certain: Carnival is without a doubt both a performance event and a commercialized celebration with pagan and Christian origins. Most Carnivals and Mardi Gras/Fat Tuesdays transpire over three or four days, ending on the Tuesday before Ash Wednesday. Brazilian Carnival is a four-day performative festival that starts on Saturday and ends on Fat Tuesday. The ritualization of this time period translates into a sequence of days experienced as mythical and magical time (García). During medieval colonial times, this annual ritual was important as social inversions occurred: slaves became kings, for example. During the early years of Carnival, White/European elite colonizers (the slave owners) stayed indoors (García).
In the twentieth century, Mikhail Bakhtin contributed a study that confirmed Carnival’s dialectic relations between a nation’s morals and values, political structure, and popular culture. For populations in medieval Europe, Carnival performances were spiritual and symbolic ways to contest big government, purge the people of demons, pacify their political and social frustrations, and defy governmental and societal restrictions. This performative event lifted the population’s spirits by transforming citizens’ negative attitudes into communal, positive energy (Armstrong 447-448). For Bakhtin, in his concept of the *carnivalesque*, all people who perform in Carnival are of equal social status. The *carnivalesque* undermines and challenges hegemonic forces by incorporating chaos and humor. Moreover, according to Bakhtin, there are no divisions of age, profession, gender, or class during Carnival. People come together as a group; they create Carnival for *themselves* (Ehrenreich 95). Moraes agrees that during Carnival, social class becomes non-existent and skin color becomes a non-issue (321). She further argues that during Carnival, people’s age, criminal history, political, religious, or philosophical preferences do not matter as long as all parties involved give themselves totally and simply to Carnival (321). It is only mandatory that all people dedicate themselves to the love and joy of Carnival, present a positive attitude, and exhibit an openness to laughter and pure fun (321).

As Piers Armstrong explains, all carnivals, no matter from what part of the world or from what time period, have one attribute in common: the recurrent struggle between the nation’s cultural and political order and its subordinated people (447). Armstrong’s argument is validated by Bakhtin’s *carnivalesque* theory, as previously discussed. The current practices of Carnival in Rio de Janeiro are astoundingly well-represented by an
amalgamation of earlier incarnations of Carnival. Such an integration of past styles began with the Portuguese, their slaves, and indigenous cultures during the colonization period. Initially Brazilian Carnival was performed solely by the slaves and lower-class individuals; later, high-society performers participated. The result, as we see today, is a unified mosaic: Carnival as a hybrid spectacle.

Brazil is also the only Portuguese-speaking country in South America, and its population reflects a mixture of civilizations and cultures, including immigrants from all over the world. There are Brazilian Europeans, Asians, African, and Middle-Easterners, to mention but a few. However, as ethnically-blessed as Brazil is, citizens encounter the dilemma of perpetual struggles alongside the country’s colossal potential. Progress is often hindered by political and social chaos, as well as by the many socio-economical inequalities. The Brazilian flag is labeled with the phrase “Order and Progress”, which has inspired endless joking and mockery among Brazilians for many years.

Brazil’s population is approximately two-hundred and eight million, ranking it the sixth most populous country in the world (IBGE 1). Brazil is considered the world’s fifth largest country by area; at 3.2 million square miles, it is the largest country in Latin America. As the land is vast and varied, so is the country’s population. Brazil is diverse in all its aspects, including its range of social classes. It is important to understand the economic strata before exploring the different types of Brazilian Carnival.

Some scholars divide Brazilian social classes from A through E, based on citizens’ median monthly incomes. However, for the purpose of this thesis, it is more crucial to dissect social classes in terms of not only income, but also in terms of how social class creates divisions in Brazilian society. According to Darcy Ribeiro, social
class in Brazil is divided into the wealthy (elite or upper-class), middle-class, and the lower-class or the oppressed (146-147). The wealthy class is mostly comprised of professionals like executives, physicians, engineers, business owners, and politicians who earn high income levels. The upper-class is usually of Caucasian descent, known for being educated and highly-skilled. On the other hand, the middle-class constitutes the working class. Individuals of the middle-classes are not considered wealthy; they are known for making ends meet and earning average incomes. However, some middle-class citizens may be able to take occasional vacations, providing that they are savvy with their finances. The middle-class population consists of professions such as mechanics, teachers, nurses, and modest business owners (Kelly). Regrettably, the largest population in Brazil consists of the lower or oppressed class. This oppressed class encompasses mostly the *favela* (slum) residents, Afro-Brazilians, and inhabitants of urban peripheries (Ribeiro 146-147). These individuals have either limited or no income, and they struggle to make ends meet (Kelly). Their various jobs are of low-level labor: *empregados* (domestic servants), ditch-diggers, street cleaners, housekeepers, servants, fieldworkers, and even prostitutes. Brazilians of this class have little or no education, and their nutrition is poor, making them more susceptible to illnesses (Kelly). Despite their every-day miserable living conditions, the oppressed class is notorious for their incapacity to organize an agenda to confront those in power (Ribeiro 147).

In Brazil, the commercialized and prevalent Carnival is celebrated and performed by all social classes and in every single city. In the smaller towns, Carnival is celebrated both in clubs and the streets. Small-town Carnival is usually informal and relaxed. If there is any set structure to the performances, this structure is normally organized on a
smaller scale. Larger cities such as Salvador in the state of Bahia and Recife in the state of Pernambuco celebrate Carnival in a more lavish manner, using the *trios elétricos* (a stage on top of enormous trucks that move slowly through the streets). *Trios elétricos* are comprised of *blocos* (blocks or groups of Carnival performers, some established and some new every year) who perform on or around their group’s truck. There are millions of Carnival attendees on the streets. The streets are so filled with shoulder-to-shoulder people that it almost appears that all citizens from that particular city are performing in the Carnival. This type of Carnival has been known to attract many tourists, both Brazilian nationals and international travelers. Many times, there is performer-spectator confusion as audience members end up performing with the *blocos*.

The largest and most extravagant Carnivals take place in gigantic cities such as São Paulo, Manaus, and Rio de Janeiro. In those Carnivals, more strict structures and firm guidelines are evident, in direct proportion to the size of these greater festivals. Rio de Janeiro’s Carnival is the most promoted, established, and widely-known; it produces the most massive festival of them all. It is, therefore, the focus of this thesis. Performances of the Carnival in Rio de Janeiro reveal the multi-faceted aspects of participants’ socio-economic heterogeneity, as well as the cultural diversity of the Brazilian population.

Brazilian Carnival in Rio de Janeiro brings Brazilians and many international tourists to enjoy the festival, but this performative event has presented much controversy among scholars. Rio de Janeiro’s Carnival has become commercialized as capitalism in Brazil wants a piece of this theatrical pie. Tourism officials declare that Brazil’s economy
gets a boost of approximately one million dollars during Carnival (Branch). Samba Schools have also become more and more commercialized throughout the years.

Samba Schools are the current official and organized Carnival groups that perform in the largest cities in Brazil, including Rio de Janeiro. A more thorough description of Samba Schools will be discussed in Chapter One. However, to clear up any type of confusion regarding the word “school” from the name Samba School, it is worth noting that the name does not imply that people go to school to learn Carnival or how to dance or play Samba Music. As one would guess, the title Samba School is yet another historic debatable controversy. With a few exceptions, it is accepted that the name Samba School was given due to a group rehearsing Carnival in its suburb named Estácio that was located next to an elementary school. Members felt that no one knew more about Carnival than they did, making them the “teachers” of Carnival. Therefore, the title Samba School seemed appropriate (Moraes 312-313). In 1928, Deixa Falar (Let Them Talk) became this School’s name; it later fused with another School forming the name Estácio de Sá, presently a top Samba School (Araújo 259).

One of the most prevalent arguments among scholars is that the performances in Rio de Janeiro’s Carnival have deviated from their roots as a cultural event, unreflective of the country’s complicated social class and landscape. As Benoit Gaudin argues, “Carnival bands have undergone a radical transformation: once community groups occupied with preparing and organizing their own participation in Carnival, they have gradually become commercial participants in the culture industry” (80). Guillermo Gomez-Peña calls this phenomenon corporate multiculturalism (García). Starting with the added element of competition, the storytelling of Carnival might have been compromised
through its emphasis on outside contributions and accolades. Furthermore, according to Alison Raphael, when Brazilians shifted their focus to the prizes that come with competition among the Samba Schools in the early 1930s, Carnival lost the collaborative essence of its formative years, undermining Carnival’s genuine manifestation of popular culture (79). This shift was mostly caused by the dictatorship years from 1930 until 1945 and the official regularization of Carnival groups in 1932. Just like any academic topic, the definition of popular culture does not come without controversy. For the purposes of this thesis, Stuart Hall’s definition of popular culture will be used. Hall claims that popular culture is based on people’s memories, traditions, experiences, and pleasures. Moreover, popular culture, according to Hall, is connected to local everyday experiences of ordinary citizens of a given culture, including their aspirations, hopes, and sorrows (472).

Alison Raphael refers to this shift in priorities in Carnival, since what was once an organic collaboration of the Samba School members to write the song, make costumes, choreograph the dances, and to express oneself, is now taken over by the higher-class and governmental rule-making. For instance, rules stipulate what theme the Samba Schools have to write songs for, the location where they can perform, and for how long each School is allowed to perform. Furthermore, when competition became fiercer, Samba Schools stopped helping one another. All wanted to win the big prize; the culture of cooperation was lost as competition between groups focused upon winning or losing (79).

Moreover, social stratification is never more apparent in Rio de Janeiro than during Carnival. Once an elaborate communal event that invited participation from a cross-section of Brazil, its roots have been markedly altered, causing a distinct evolution in
how the celebration is presented from the early 1930s to present day. One academic writer agrees that drastic commercialization of Carnival has negatively impacted the lower-class participation in the festival (Gaudin 80). On the subject of Carnival’s deterioration from its original intent, J. Lowell Lewis even asserts that Brazilian Carnival is now commonly accompanied by fights and murder (549).

Has Brazilian Carnival in Rio de Janeiro turned into a commercialized spectacle of images that overshadows performance and storytelling? The significance of present-day Carnival still offers oppressed members of the society a means by which to “decolonize” themselves and live a “problem-free” life, as Bakhtin explains, even if it is only for a few days. However, the higher society jumped on the “happy Carnival bandwagon,” not because they may be financially strained, but because they too have a challenging life under the politically flawed Brazilian government.

Presently, Carnival in Rio de Janeiro has changed its storytelling perspectives. The performances and stories told during the festival only rarely echo the struggles of the underprivileged class. With the rise of commercialization, the upper and middle-classes infiltrated the celebration; performance and storytelling now mirror the struggles of all levels of society in opposition to corruption. Hence, while commercialization of Carnival has been criticized by many scholars for aesthetic degradation and decadence, some positive impacts of commercialization on Brazilian society cannot be denied. Benefits include the creation of jobs, a boost in the country’s economy, and the formation of social programs that benefit millions of underprivileged Brazilians. The aesthetic deterioration presents a possible complication to the festival; such implications will be critically analyzed. These include the exploitation of women, excessive funds spent on production,
and the question of authenticity of performance and storytelling. Still, Carnival epitomizes the essence and spirit of Brazilians, representing their alternate “Carnival” ethos. For the purposes of this thesis, ethos is defined as “the characteristic spirit of a culture, era, or community as manifested in its attitudes and aspirations” (“English Oxford”). Thus, the marriage between the benefits of commercialization and the spectacular storytelling and performances of Carnival in Rio de Janeiro must be a happy one.

Many of the scholarly studies regarding Carnival are written and analyzed from a social science, ethnological, historical, or anthropological point of view. For example, the important Brazilian scholar Roberto da Matta looks at comparative social anthropology to explore the systems, values, and attitudes that help form the Brazilian identity. He explores the dilemmas that Brazilians face while striving for a harmonious and equal society that is in constant conflict. He studies Carnival in terms of its rituals, dialectics, and symbols, and how Brazilians of different social classes interpret their culture and identity. Fewer analyses focus on Rio de Janeiro's Carnival from a theatrical and performative perspective. The objective of this thesis is to further these theatrical and performative points of view, as well as other topics of academic study. I will explore how the nature, scope, and methods of storytelling developed, altered, and progressed throughout the years of the festival.

Through the inspection of the past and current productions of Brazilian Carnival, I plan to analyze the progression of innovations made and executed that have brought Carnival to its present day’s successes and failures in terms of performance. I want to investigate how these changes and implementations are presently affecting performance
and storytelling from performers’ cultural and social frameworks and perspectives. I hypothesize that some changes or adjustments in production must take place in order for performers to tell a clear story through their Samba School’s theme. If so, can Rio de Janeiro’s Carnival performers accept, adapt, and adjust to these changes without losing the essence of the ongoing collaborative spirit of true communal and joyful Carnival?

In his book *Carnivals, Rogues, and Heroes: an Interpretation of the Brazilian Dilemma*, Roberto da Matta claims:

> All are joined as mere Carnival *foliões* (partiers) and as full members of the same human species eternally searching happiness, and above all, as *Brazilians*…Stripped of our social roles as members of a family, neighborhood, race, occupational category, and social segment, we are left simply with the truth that we are nothing more than men and women seeking pleasure in a certain style. It is because of this that we can instantly conclude that we are, above all, Brazilians (84-85).

Carnival in Rio de Janeiro functions as a cultural and social unifier of Brazilians, bringing together individuals of different ethnic, racial, and social classes. Despite the perpetual societal segregation and government corruption that affect all Brazilians, Carnival in Rio de Janeiro is a performance event that establishes a liminal time and space in which participants and spectators alike can celebrate and "perform." Carnival reaffirms the resiliency of Brazilian-ness; it creates an ethos within an ethos. Time and time again, scholars such as Roberto da Matta, Eneida de Moraes, Maria Isaura Pereira de Queiroz, and Hiram Araújo claim that during Carnival, Brazilians—regardless of their race or social class—do not want to be themselves. This is because to be Brazilian means
to be drastically and negatively affected by a corrupt government and social problems like violence and crime. Hence, in those four days of Carnival, Brazilians live as the Other, and this Other reflects a period of pure happiness when they can temporarily forget their problems and create an alternate ethos for Brazil.

British cultural anthropologist Victor Turner (1920-1983), while studying and observing African ritual processes, hypothesized the theory of liminality. Turner described that the Africans’ ritual process creates "liminal" space and time, explained in his phrase "Betwixt and Between," where every day society's social hierarchy, order, and structures become suspended. Resembling Bakhtin’s carnivalesque’s concept, Turner further observed that during this ritual process, participants embark on a trajectory of “Redressive” (healing) experience, resulting in individual and communal transformation upon conclusion of the ritual. An example of a transformation in a ritual of passage is a boy “turning” into a man. Drawing upon Arnold Van Gennep's original use of word, Turner refers to “limen” as a threshold that thrusts individuals from one reality to another. In Turner’s article, "Are There Universals of Performance in Myth, Ritual, and Drama," he explains that this “liminal” applies not only to "technologically simpler societies," but also the advanced and "technologically 'complex' societies" such as Brazil. Thus, he posited experiences of liminality take through cultural and artistic performance genres. Turner argued that Carnival as ritual and cultural performance, affords the liminal or liminoid experience for the spectators as well as performers.

During the four days of the Rio de Janeiro’s Carnival celebration, both Brazilian citizens and international tourists undergo a suspension of ordinary social structures where they assume new and different roles. This concept is referred by Turner as
“communitas,” which indicates “temporary.” Upon the conclusion of Carnival, performers and spectators return to society to their ordinary lives (291-301). One may argue that the only difference between Turner's theory and Carnival effects is the question of the so-called promised "healing" and "transformation" that take place in the African rituals.

With Brazilian Carnival, it is not feasible to gauge the effectiveness of each individual’s experiences of healing. The tenaciousness, the durability, and the indestructibility of Rio de Janeiro’s Carnival is a testament to the evidence of "transformation." Thus, Carnival of Rio de Janeiro has proven to be a powerful expression of Brazilian resiliency. Subsequently, Brazilians and tourists from around the world continue to enjoy this incredible performative event. To beat or not to beat to the Carnival rhythm will never be a question.
CHAPTER 1: HISTORY OF CARNIVAL

Carnival in Rio de Janeiro

As many countries celebrate Carnival, it is important to note the differences between Carnival in Rio de Janeiro and other types of Carnival in the world. Generally, when one thinks of Carnival, he or she may think of masquerades, parades, and celebrations. Although not completely disregarding these characteristics, Carnival in Rio de Janeiro is unique from other Carnivals in the world. Alan Riding argues that other Carnivals have similar flavors of Rio de Janeiro’s Carnival, but none matches Rio de Janeiro’s “explosion of pre-Lenten revelry” (1).

Although many countries normally perform a type of Carnival that represents each of their country’s cultures and social mores, their Carnival differs in their traditions and organizational styles. Italian Carnival in Venice, as an example, is known for its luxurious Carnival that features detailed and exuberant masquerades along with refined costumes. Carnival in Venice is four hundred years older than Carnival in Brazil. Similar to Rio de Janeiro’s, Venice’s Carnival engages in some competition for best costumes, although competition in Venice’s Carnival is not as involved as Brazil’s. Gala balls are also traditional in Venice (Vilanova 58). Germany celebrates Carnival into three separate days. German Carnival parades involve allegoric cars, DJ’s, food, and costumes. Moreover, for one day, German Carnival celebrates women, who perform the parade with scissors, cutting off men’s ties. These ties represent a symbol of male power, hence, once cut, German Carnival honors women’s equality (Vilanova 57). In Mardi Gras, the celebration takes place in New Orleans in the United States. This Carnival highlights masks, and colorful costumes, especially in the colors of gold, green, and purple. This
festival happens in the French Quarter, since it originated from French groups who settled in that area in the 1700s (Mauldin 11; Vilanova 57). Trinidad’s Carnival, known for its masquerades and vigorous dancing, has evolved into an enormous celebration that is participated by many different ethnic groups (Mauldin 10). South American countries such as Colombia also prestigiously celebrate Carnival. Colombia’s city of Barranquilla has an elaborate Carnival, considered to be the second largest in the world, “losing” to Rio de Janeiro’s. Barranquilla’s Carnival features folkloric traditions, children’s performances, and different types of music such as salsa, merengue, and rap. Similar to Rio de Janeiro’s Carnival, Colombian Carnival also showcases intricate costumes and floats. Barranquilla’s last day of Carnival ends with the traditional burial of “Joselito,” who is a character representative of the joy of Carnival (Vilanova 59).

Many of these worldly Carnivals honor cultural traditions and they take place in smaller towns or villages. The urban Carnivals, even if structured, focus heavily on costuming, masquerade, cultural traditions, and floats. For these Carnivals, there is also much room for creative freedom and space for invention. Conversely, Brazilian Carnival, especially from Rio de Janeiro, is known for its distinguished Samba Music and Samba Dance, making its Carnival unique. Moreover, the competition and commercialization aspect of Rio de Janeiro’s Carnival is also highly developed, and its industrialization has become a massive enterprise in itself (Popenhagen). Prior to investigating the commercialization aspects regarding Carnival of Rio de Janeiro, it is fundamental to first explore its historical developments.
Development and Unique Aspects of Carnival in Rio de Janeiro

The historical trajectory of Carnival in Rio de Janeiro is complex and convoluted. There have been many different Carnival groups, and some of them have overlapped each other time-wise, making it challenging to track them linearly. In addition, Carnival entities get confusing to understand as there were societies, associations, guilds, unions, and more; all differing from one another. The following is a summary of the history of Carnival in Brazil that is culturally and socially pertinent and within the scope of this thesis. It is essential to indicate that the commercialization of Carnival from Rio de Janeiro as we know today did not manifest and establish itself until the early 1930s when the Brazilian government regularized the Samba Schools.

In Rio de Janeiro, the first Carnival took place in the nineteenth century and it was known as *entrudo*. In Portuguese, *entrudo* means “entry” (or introduction to Lent), and enter Brazil they did. This kind of primitive Carnival originated in Portugal, Brazil’s colonizer. Hence, the Portuguese immigrants, along with their slaves, were responsible for bringing *entrudo* to Brazil. Once in Brazil, *entrudo* was first celebrated inside the elites’ homes. The *entrudo* included plays such as water fights, practical jokes, and the throwing of *laranjas* or *limões de cheiro*, which were wax balls filled with orange or lemon-flavored water (Queiroz 45). These elite performers played *entrudo* games in a careful and polite way, demonstrating their “classy and well-mannered cultures.” Moreover, the elite did not want their furniture or anything else inside their homes to be damaged. Later, the lower-class, including slaves, started playing these games amongst themselves on the streets. However, it is well documented that the street players were much rougher, and “savage-like,” using enormous syringes to douse or dirty innocent
passers-by, leaving the “victims” both surprised and angry (Kraay 436). These Carnival players also used white flour, mud, soot, lemon or orange-perfumed wax balls, as well as fresh or rotten eggs. Moraes depicts *entruedo* as an undomesticated and pig-like type of Carnival that scared tourists. She points out that Jean Baptiste Debret, a painter and engineer who lived in Brazil for fifteen years, was a key contributor to recording *entruedo* activities. Fig. 2 depicts Debret’s drawing of *entruedo*, which shows performers throwing the infamous wax balls and wetting individuals with their syringes.

![Fig. 2. Drawing of *entruedo* Carnival in Rio de Janeiro from: Jean-Baptiste DEBRET (1768--1848), artist](image)

As the lower-class *entruedo* performed games to rebel against their oppressed cultures, the “civilized” society continued to perceive *entruedo* as aggressive and violent.
It should not come as a shock that these *entrudo* partiers got into constant trouble with Brazilian law enforcement. The police force tried to ban *entrudo* repeatedly, finally succeeding in 1855 (Kraay 428 and 451). However, Moraes asserts that *entrudo* did not completely meet its demise until 1908 (41-42). Regardless of the exact date, the end of *entrudo* was a relief to Brazilians, not only for its stigma, but also because *entrudo* games often resulted in peoples’ health problems such as tuberculosis. Sadly, *entrudo* games even caused a few deaths (Kraay 444-445).

In the midst of the infamous *entrudo* period, another form of Carnival was born, known as Zé Pereira. Zé Pereira groups used musical instruments such as *bombos* and *tambores* (different types of drums) while they paraded the streets (Moraes 60). According to Hiram Araújo, there is scholarly debate regarding the birth of this new group. Some scholars say Zé Pereira originated in 1840, and some claim it was born in 1846. Yet, other scholars assert that 1850 was the year of Zé Pereira (134). Despite the uncertainty of the precise year, Zé Pereira was essentially the Carnival of the lower-class, however, they differed from *entrudo*. They did not play the “atrocious *entrudo* games” that were condemned; instead, they used instruments to parade down the streets, and Zé Pereira groups were considered harmless. Socially speaking, although Zé Pereira groups were still considered lower-class, one could argue that they were a higher-class than *entrudo*, since Zé Pereira performers did not engage in detrimental games. Moraes further argues that despite the fact that these lower-class Zé Pereira individuals suffered from an arduous life, it was so easy for them to find happiness while playing these drums and performing on the streets. Zé Pereira performers would endeavor to share their culture via songs and music although one may not call what they were attempting to play “music.”
Zé Pereira members would wear simple costumes. Their members claimed that there was no need to fuss about fancy costumes, accessories, or properties. When Zé Pereira performers phased out in the beginning of the 1900s, another group emerged, called Carnival blocos (blocks). These blocos substituted the Zé Pereira musical instruments bombos and tambores for tambourines, which are still popular today (62-63).

In 1822, Brazil claimed its independence from Portugal. This triumph led Brazil to be open to foreign commerce and European influences. Entrudo Carnival was seen as a shameful representation of the nation, as Brazil was concerned with its image abroad. In 1855, as the elite abandoned their own version of entrudo, they opted for a more elegant way to perform Carnival by engaging in masked balls and parades (Kraay 431). Through this “Europeanization” process, Brazil started importing Carnival traditions from European cities such as Venice, Paris, Nice, and others (Real 208). Brazilians wanted to appear “European-progressive” and not “barbaric” (Queiroz 50; Kraay 428). Hence, these sophisticated Carnival performers took their cultural relevance of quintessential performances to a higher level than the elite entrudo.

From the very beginning of this new era, the first “enlightened” clubs that held carnival festivities were titled Sociedades Carnavalescas (Carnival Societies). These Carnival Societies were made out of club members who were known for their elegance and expensive costumes. They also hired musical bands and paraded the streets wearing masks. For the first time, the Societies performed Carnival in compliance with rules of the city of Rio de Janeiro (Moraes 65). The first Carnival Society was named Congresso das Sumidades Carnavalescas (Congress of Carnival Committees) and they were comprised of eighty members, all of whom were considered “good-decent people” (66).
Hence, *Sumidades Carnavalescas* marked a new phase in the history of Carnival in Rio de Janeiro in 1855. *Sumidades Carnavalescas* made Carnival in Rio de Janeiro comparable to other European Carnivals (67). According to Moraes, this type of elegant Carnival started getting stronger but more distant from what was considered the base, the fertilizer, and the thrusting force that was once the primitive Carnival of Rio de Janeiro (68).

This “new” Carnival was not exclusively celebrated in the form of street parades. These “classy” performances also consisted of fashionable masked balls that took place in theatres and private clubs. The street productions featured floats and fancy costumes. Popular costumes for the balls included commedia dell’arte influences such as Pierrot, Harlequin, Colombina, and Pulcinella (Real 208). The choice of music varied from popular, classical, to opera. The elite had taken over the street festivities, and the three major Carnival Societies known as *Tenentes, Democráticos, and Fenianos* were responsible for the birth of the allegoric cars during the parades (Moraes 100-101). The allegorical cars at the time were floats that rode down the streets during the parade, and they were highly decorated and luxurious.

By the 1860s, higher-class Carnival hegemony led to the prohibition of the lower-class performances. Fortunately, this ban came to an end when the abolition of slavery was proclaimed in 1888. By then, the *Agremiações Carnavalescas* (Carnival Organizations) were born and many different Carnival groups began to form (Real 209). Also born in the 1800s were the previously mentioned *blocos* (blocks), another different type of Carnival. These *blocos* were comprised of mostly lower-class citizens who would gather around their neighborhood and perform. *Blocos* were either improvised or
organized groups that had to abide by their own rules. Structured *blocos* had leadership, respected rehearsal schedules, and so forth. The *blocos* were licensed by the police to participate in the Carnival parades in 1889 (Moraes 161).

In the late 1800s, the *cordões* (chains) were born. *Cordões* encompassed lower-class members of African heritage, and they did not flourish until the early 1900s (141). Unlike *blocos*, these groups were known for their use of masks. They performed as *velhos* (old men), who were known for their expensive outfits and special lyrics. *Cordões* also performed as *palhaços* (clowns), king and queen, among other characters. Some groups used to dress as Indigenous people, and they only used percussion instruments to perform (137-138). According to Moraes, the *cordões* became popular in 1910 (132).

The *ranchos* (tropes) replaced the phased out *cordões* in 1911 (148). *Ranchos* were considered “better civilized *cordões*; at least these groups were more complete as they included the “feminine touch” as well (154). Known for having smaller groups comprised of modest people of African heritage, *ranchos* presented the boldest initiatives. They would sacrifice and fight tooth and nail to make sure they had enough money to produce their Carnival, often asking monetary assistance from the government (158). The “organized *blocos*” slowly disappeared in the 1930s, leaving only the improvised-unofficial groups, ones that did not have money for production, a director, a “headquarter,” or a stable place to rehearse.

In the early 1900s, a parallel Carnival was also taking shape, labeled the Carnival of the “people,” which included individuals from the *favelas* (slums). These types of group performers would come down from the slums and gather at *Praça Onze de Junho* (June Eleventh Square) to play instruments and sing about local or national issues that
affected their social status (310). Moraes argues that it is at that square that Samba Music was born (134-135), although there is also debate regarding this claim. It is apparent that all lower-class Carnival groups, which included *entrudo, blocos, cordões, ranchos*, and *favelas*, performed to dignify their African cultures as well as comprehend and exercise their lower social-class troubles. Very much aligned with Victor Turner’s theory, these groups used Carnival as a form of escapism by performing their Brazilian-ness through their alternate ethos, shaking off their social roles to become the Other.

**Rio’s Samba Schools**

Once the gathering of the slum groups solidified and Samba Music started to develop, another type of Carnival surfaced, known as *escolas de samba* (Samba Schools). Samba Schools still exist today (165). Providentially, by the 1920s, *favela* Carnival groups felt the need to cease violence and animosity against one another. These groups wanted to become classier and perform more nobly. They aspired to be more organized, and more *rancho*-like. Hence, the *favela* groups wanted to create a new theatrical convention and designation in order to get a fresh start (Araújo 259). There is some debate regarding the origins of Samba Schools, but it is mostly accepted by scholars that these Schools originated from the *ranchos* (Moraes 310).

The most fundamental differences between Samba Schools and *ranchos* were the musical rhythm, the evolution, and number of performers involved (260). Hence, Maria Isaura Pereira de Queiroz agrees that the first Samba School was founded in 1928, when these differences became apparent. However, it was not until 1935 that these Samba Schools were allowed to “legally” perform and get involved in the official theatrical competitions in Rio de Janeiro’s Carnival (Queiroz 57; Araújo 268). That year, the
Schools received the initials G.R.E.S., which stands for Grêmio Recreativo Escola de Samba (Recreational Guild of Samba Schools) and are still used today. The Schools were then given the right to some financial assistance from the government (Araújo 268). After Samba Schools formed their union, there were legally registered civil societies that held elections for each Samba School’s renovations and management (Moraes 311). Still relevant in present days, being in charge of the orchestra, the director of bateria (drums) is elected. Another vote is cast to elect the director of harmony, who is responsible for coordinating the coherence between the music and the singing (Moraes 311).

Eneida de Moraes explains that in 1957, Samba Schools signified a cultural popular association whose main objective was to participate as a group in Carnival of Rio de Janeiro (309). However, Edison Carneiro, a Brazilian writer and scholar of Afro-Brazilian studies, brings up an important argument. He reminds Brazilians that in the past, each Samba School used to meet at its correspondent suburb where members would play music in order to soften the suffering of their life’s hardships (Moraes 309). Presently, Samba Schools represent an idea or theme, and they perform a theatrical enredo. Enredos are complex artistic creations and actions executed by performers in Carnival to provoke emotions in spectators through a concept or theme (Moraes 311-312). In each Samba School’s performance, all of the details of the storytelling aim to support the School’s enredo. These details englobe the entire production, including costumes, allegorical cars, the Samba song lyrics, visuals, properties, lighting, cast, and crew. Moreover, this enredo is kept under the utmost secrecy by each Samba School during the entire year, and it is only revealed to the public at Carnival time (312).

The causing of emotions that triggers a cathartic effect on spectators reflects much
of what theorist Aristotle explained in his *Poetics*. There is much speculation in scholarship regarding the actual meaning of catharsis in Aristotle’s writings. However, it is widely accepted that Aristotle defined catharsis as the purgation of emotions, especially pity and fear, not just from tragedies, but through art in general (Kim). Catharsis can also lead to audience’s renewal and restoration. Although Rio de Janeiro’s Carnival spectators hardly purify their emotions from pity and fear per se, there is certainly an unquestionable feeling of renewal from their challenging lives, which is reciprocal from the performers’ perspectives. By performing their alternate ethos during Carnival, these performers reach a cathartic effect similarly to *carnivalesque*’s notion of reaching communal positive energy, previously presented by Piers Armstrong (447-448).

**Samba Music and Samba Dance in Carnival**

What do you think about when you hear the word “samba?” Do you think of music or do you think of dance? What is Samba exactly? As confusing as it seems, Samba is both a style of music *and* a type of dance. Brazilians refer to playing of Samba as in music or dancing the Samba as in the dance. Both Samba Music and Samba Dance will be explored in this thesis. A critical analysis of how commercialization of Carnival has had an effect on both music and dance genres will be investigated. Moreover, an evaluation of how commercialization has affected the performances of Brazilian’s alternate ethos in Carnival will be discussed. The crystallization of both Samba Music and Samba Dance presents the perfect marriage to providing the spectacle performances that we see in Rio de Janeiro’s Carnival. To better comprehend the dynamic of both Samba Music and Samba Dance, it is essential to study them separately.

When discussing Samba Music, we must review Carnival music’s fascinating
history. Surprisingly, polka was the musical choice of Carnival in 1845. Then *lundu* and *maxixe* music became popular (Moraes 189). *Lundu* music is a style of music of African origin, played in 2/4 time with the first beat syncopated. *Lundu* also refers to the first African style of music to be accepted within the Brazilian higher-classes (Myers 291). This style of music was deemed the first formal imprint as a national musical genre, although some scholarship argues that *maxixe* was the first true Brazilian musical style (Myers 291 and 421). *Maxixe* is a musical fusion of different types, including *lundu*, Brazilian tango, and the polka (Myers 421). Gerard Béhague, among other scholars, agrees that Samba Music is considered the nationalistic musical genre in Brazil. In the late 1800s, Samba Music was already being performed, orchestrated by director-composer Leopoldo Migúez (23). John Charles Chasteen also states that, in the nineteenth century, Samba Music was already present during Carnival, way before the 1920s when Samba Schools became official (30). Béhague further explains that the composers, mixing well-known genres such as the Brazilian tango, *maxixe*, and the early incarnations of urban Samba rhythms, gave birth to the vernacular Samba Music as we know today (41). Araújo also expands the knowledge of Samba Music history, arguing that the Samba Music of today, besides having influences from *lundu*, *maxixe*, among others, also comes from the African Samba Music of the sixteenth and seventh centuries that was played in Bahia, a state in Brazil (145).

Samba Music is known for the use of many percussion instruments and some strings as well. For its rhythm, Samba Music is played in a 2/4-time syncopation. It is well established among scholars that the first song especially written for Brazilian Carnival was “*O Abre Alas*” (open the wings or clear the way) in 1899, by Chiquinha
Gonzaga. This song was written specifically for one of the cordões groups, and it became extremely popular having been sung by millions for years and years. In 1917, Carnival enthusiasts were introduced to the song “Pelo Telefone” (On the Telephone) written by Donga and Mauro de Almeida (Moraes 193; Araújo 146). Moraes’ chapter on music and dance is somewhat confusing as she later alleges that the first Brazilian Carnival songs emerged around 1910 and 1913. She further explains that “O Abre Alas” was only written for a group of cordões, not for the people and therefore not for Carnival in general. She claims that starting in 1915, composers wrote songs for the people, so anyone could sing along (194). She also asserts that “Pelo Telefone” marked the birth of a new Carnival, the Carnival of Samba (195). It is understandable that there is a difference between writing songs for a particular group and writing songs for people in general. However, aren’t groups made out of people? Are we splitting hairs on this argument? If so, there is nothing wrong to consider the first Brazilian Carnival song to be “O Abre Alas” and to consider “Pelo Telefone” the first Samba song, even though Araújo discloses that some composers deemed “Pelo Telefone” a maxixe or other styles (146).

Regardless, by 1920, all songs were considered Sambas (195). Carnival music, Moraes argues, is the purest form of music in Brazil because of its distinct Samba rhythm (196). Moraes claims that nobody can predict a hit Carnival song. No one knows what the Brazilian people will enjoy and what they will consider to be a terrible song (196-197). Just like the history of Musical Theatre suggests that certain Musicals became popular due to what was happening in America, the same can be paralleled to the taste of music in Brazilian Carnival. As an example, in America, the musical Oklahoma! opened in 1943 and it highlighted the fact that land was something worth fighting for. The musical was a
success because it came out at the right time, toward the end of the Second World War. In the beginning of Samba Music composition, its lyrics heavily reflected on political concerns, but from 1930 until 1945, the music had to undergo rigid alterations. During these fifteen years of dictatorship under President Getúlio Vargas, musicians were not allowed to write about politics or the military regime. Therefore, songwriters had to write and explore lyrics revolving different themes, especially national ones (Moraes 197). This complication had an effect on performers’ alternate ethos as they could no longer perform their troubles away and “purify” their spirits, much like the “Redressive or Healing Process” Victor Turner refers to. Nevertheless, Carnival went on and performers found a way to find joy and catharsis through their performances, despite the imposed themes. While listening and dancing to a compelling and thrilling Samba song, one can be infected as if bitten by a happy bug. The body goes into an adrenaline rush, much similarly to a Bacchanalian frenzy. It is not a certainty that only Brazilians possess the DNA of this passionate susceptibility; however, this would be a study for another thesis.

In 1930, musicians started using percussion instruments in studio recordings, and Samba Music never looked back. The name “Batucada” (beating of drums) became the norm in Samba Music and it was labeled the true rhythm of Brazilian Carnival (Moraes 197). As previously mentioned, there is much disagreement in scholarship regarding the origins of Samba Music, whether it came from the people in the morros (slums) or from the urban folks. Moraes explains that the first Samba songs originated in the city and then “traveled” to the morros, where some of the instruments were modified, hence the confusion (198). However, it is fair to argue that Samba Music had both urban and morro influences, thus creating a mosaic effect of what the samba rhythm sounds like today.
However, John Charles Chasteen claims that Samba Music is a fusion of both Portuguese and African influences, and this blend of musicality reflects the mixing of races that helps shape the Brazilian national identity (30). Chasteen brings out yet another dispute. He explains that some skeptics feel that the economically marginalized Afro-Brazilians are musically exploited by the capitalist Brazilian society. He argues that this music commercialization by the mainstream occurs in order to allude toward a racially-mixed country that is no more than just appearance-based (30-31). Chasteen refers to the unfortunate problem of racism in Brazil, where it is “acceptable” for European Brazilians to enjoy Samba Music or for all social classes to perform together. However, he argues, it is less likely for these European Brazilians to consider the Afro-Brazilians as their equal.

This dichotomy of different social class performative commotion and interracial seizure has raised much concern among academia. What this dichotomous concept means to the Carnival performers in Rio de Janeiro is that the Afro-Brazilians’ stories are being distorted and their performances are no longer authentic. The same can be argued for the Caucasian upper class whose performances of singing, dancing, displays, and storytelling mirror Afro-Brazilian struggles, thus resulting in inauthentic performances. However, since the commercialization of Carnival took place in the 1930s during the years of dictatorship, affecting the making of Samba Music as well, the once organic Samba Music written by the Afro-Brazilians is no longer a representation of their roots. It has become a fabricated, diverted, and harnessed style of music that has blended the social classes, which turned out to be a positive development for Carnival of Rio de Janeiro.

Furthermore, the different themes performed by Samba Schools are so varied that one can also argue that the more pressing social and political issues are being highlighted
in Carnival through the Samba School stories, as opposed to exclusive racially-based enredos. For example, some of the themes criticize Brazilian’s politics, which affects all social classes. To illustrate, the Samba School winner of Rio de Janeiro’s Carnival in 2018 was a School by the name of Beija-Flor, whose theme was to tell a story of the degradation of a country whose potential is enormous, yet it is being destroyed by the dirty politicians. The problem is that these stories are still being told via Sambas, hence the dilemma of authenticity in question. If Chasteen’s claim that the Samba Music is a blend of both Portuguese and African influences, then the performances would come across as more legitimized, as all social classes perform in Carnival. However, if scholars argue that Samba Music was born purely from African influences, then this legitimacy is faulty. Pairing the authenticity issue of past Carnivals with the evolution of Samba Music to be the unifier of Brazilians may no longer be a fair assessment of legitimacy, as present-day Carnival Samba Music presents the Brazilians’ alternate ethos through the “Redressive” and Reintegration (transformation) processes as defined by Victor Turner.

Parallel to the evolution of Samba Music, the trajectory of Samba Dance history is a meandering one, and Carnival dances also journeyed through various transformations. The types of Carnival dances changed from polkas, waltzes, tangos, lundu dance, to maxixe dances (Moraes 52). The lundu dance was characterized as an interracial couple dance, whose African influences resulted in a mulata dancer and her white partner (Chasteen 35). The maxixe dance, Chasteen explains, was born out of lundu and it did not indicate a particular dance step; it was more like a form of body movement (38-39). Maxixe, a couple’s dance, was characterized by the sinuous actions of the hips, legs, and torso, and the close proximity of the couple dancers. Chasteen discloses that in the
nineteenth century, the lower-class Brazilians performed the Samba Dance. This dance referred to a polyrhythmic style that was accompanied by percussive instruments (30). Moraes considers *maxixe* as the first type of urban dance created in Brazil (189). Much like the *maxixe*, Samba Dance was not a specific kind of dance but a style of body movement (Chasteen 30).

Present-day Samba Dance in Rio de Janeiro’s Carnival is performed individually, not as a couple’s dance. It is known for its vigorous hip movement and complex feet pattern, either with the leading foot stepping forward first, or going back. The upper-body is normally more stabilized. The arm movements usually differ slightly from dancer to dancer, but the arms are supposed to graciously swing from side to side, opposite side of the leading foot. Samba Dance is a fast and difficult dance to master. This dance also requires extreme coordination and stamina. Samba dancing is said to liberate both male and female performers, as extrapolated in Bakhtin’s idea of ridding oneself of demons and creating a positive energy. Although shaking one’s body vigorously could give performers a purging effect, there is also the cultural aspect of Samba dancing that honors the performers’ African heritage.

**Performance Components in the Samba Schools**

To fully understand Carnival of Rio de Janeiro’s theatricality and to grasp critical analyses of its cultural and social significances, it is imperative to delve into the Samba School’s elements and realms. First, the term theatricality needs to be defined. There are many definitions of theatricality. For the purpose of this thesis, David Z. Saltz’s partial definition of theatricality from the Oxford Encyclopedia of Theatre and Performance is chosen:
Presentational mode of performance that draws attention to its own status as theatre and as artifice. Performances can acquire a quality of theatricality through the use of puppets and masks, displays of vocal or physical virtuosity, and conventions such as the aside. Theatricality has little meaning in contexts where virtually all dramatic performance is overtly theatrical, such as most non-Western theatre, or Western theatre prior to the nineteenth century. Theatricality opposes attempts to absorb an audience fully within the fictional world of the play and to conceal or repress the world of the performance. While Denis Diderot’s eighteenth-century notion of the imaginary ‘fourth wall’ anticipates the anti-theatricality ideal, that ideal did not gain wide currency until the end of the following century with the advent of realistic drama and production. . . In the early twentieth century, in reaction to the newly dominant aesthetic of realism and naturalism, a counter-aesthetic of vigorous theatricality sprang up. Russian director Vsevolod Meyerhold was at the forefront of this trend, and slightly later Bertolt Brecht's theory of epic theatre provided its most fully articulated and influential ideological rationale. As a metaphor outside of theatre, theatricality suggests the self-conscious construction of a public persona, as in the example of drag. . . One of the most famous and controversial applications of the concept of theatricality outside theatre is critic Michael Fried's attack on the ‘theatricality’ of art styles, such as minimalism, that emphasize the objecthood of the artwork and acknowledge the presence of the viewer . . . (Saltz)
In Rio de Janeiro, Carnival takes place in the Sambódromo (Sambadrome), a wide boulevard that can hold thousands of performers and gigantic allegorical cars. The Sambódromo is two thousand and three hundred feet long, and it contains bleachers on either side of the street to accommodate ninety thousand spectators (see fig. 3 and fig. 4). During their performance, Samba Schools arrange their alas (wings or sections) on the Sambódromo, abiding by the rules of the Carnival organization.

Fig 3. Sambódromo view from the higher seats’ perspective from: Ben Tavener

Fig. 4. Panoramic view of Sambódromo from: Gresasc
The following is a description of the performative components of Rio de Janeiro’s Carnival according to Hiram Araújo, who is considered the expert in the Carnival theatrical conventions and elements. There are many mandatory components of Carnival, and each Samba School has to have all of these elements in order to be qualified to perform and get a chance to win the competition. These elements are quite detailed and complex; hence, a summary will be made to meet the needs of the thesis.

Alas, or wings as described earlier, contain the sambistas (male and female Samba performers), who dance and sing according to a choreography, wearing uniformed costumes. Samba Schools have many alas, each independent of one another and under different direction, but they all serve the overall School’s theatrical direction (278). Some alas have ten performers, while some alas have up to two hundred participants. Even though all sections are unique, they have one main purpose—to support the Samba School’s theme. The performers are divided into specialized and non-specialized (278). The specialized sambistas, or principal actors, are further divided into: Comissão de Frente (Front Commission), Passistas (Samba Steppers), Ritmistas (Samba Dancers and Musicians), Instrumentistas (Drum Players), Compositores (Samba Composers), Puxadores de Samba (Principal Singers), Mestre-Sala with Porta Bandeira (Samba Host with Flag Bearer), Destaques (Highlights or Special Guest Performers), Baianas (performers from Bahia, a Brazilian state), and Velha Guarda (Vanguard).

The Comissão de Frente performers are the first ones to open up the performance. Comissão de Frente are performers dressed in identical suits who represent the Board of the Directors, while moving to the rhythm of the Samba Music. These performers greet the spectators and they must coordinate and synchronize their creative performance,
setting the tone for the entire Samba School’s overall performance (278-279). The *Passistas* are Samba Dancers who free-style and improvise the Samba dance. They do not follow a specific choreography. *Ritmistas* are like *Passistas*, but they also have to play percussion instruments, and *Instumentistas* are performers who both play the drums, sing, and dance (see fig. 5).

![Samba School Performance](image)

*Fig. 5. Instumentistas* performing for their Samba School from: Jussara Razzê

*Compositores* are performers who have actually also composed the Samba Music. *Puxadores de Samba* are the principal singers who are also called interpreters; not language or plot interpreters, but interpreters of how to sing the Samba *enredo*. These performers sing into a microphone during the entire performance (sixty-five to seventy-five minutes, non-stop). The *Mestre-Sala*, a male performer, and the *Porta-Bandeira* (Flag Bearer), a female performer, are a couple who dance to the rhythm of the Samba
Music, but they do not do the Samba Dance. They represent the symbol and flag of the Samba School, and they move in traditional dance steps, including curtsies, twirls, and back-and-forth movements. This couple must perform in a coordinated, harmonious, and majestic manners, exhibiting grace and ease throughout the entire performance. Moreover, the Mestre-Sala elegantly protects the Samba School’s flag and courts his dame, the Porta-Bandeira. In turn, the Porta-Bandeira holds the School’s flag and she must not tangle it while dancing, exhibiting tremendous skills and coordination (see Fig. 6).

Fig. 6. Mestre Sala and Porta Bandeira performing for their Samba School from: Renata Barros

Destaques are highlighted or special-guest performers who represent the characters of each Samba School’s enredo. Some Destaques are performed by celebrities
such as well-known actors, musicians, or a family member from a Carnival sponsor. Fig. 7 shows two Destaques on top on an allegorical float.

Fig. 7. Destaques perform for their Samba School on top of the allegoric float from: Agência Brasil and Sueli Freitas

The Baianas are dancers who characterize the population from the state of Bahia. This ala comprises of respectful older ladies who represent and pay homage to the African population and early stages of Carnival. They are known for twirling with their beautiful colonial-style dresses. These dresses are heavy and elaborate, and they can add to the difficulty to the performers’ dancing. Fig. 8 depicts a typical Baianas ala.
Fig. 8. *Baianas* performing for their Samba School from: Sebastião Marinho

The *Velha Guarda* are the “old school” or “veteran” performers who are known for having participated in Carnival for years. Both *Baianas* and *Velha Guarda* performative theatricalities receive standing ovations from the audiences. This standing ovation signifies the respect paid to these senior performers and their cultures.

Aside from the performers, another integral element and a big part of Carnival are the *Alegorias e Adereços* (allegories and allegorical cars). These allegorical floats can be either on wheels (motorized) or on the ground, pushed by performers. These floats are monumental in size and glamour (see fig. 9). The artistic range and creativity poured into these floats is a true aesthetical wonder. *Destaques* usually perform on these floats, and they cannot be afraid of heights.
The *Bateria* (drum) group is referred to the performers who play the drums to the Samba Music. They must sustain the music’s cadence throughout the whole performance, showing their versatility, coordination, and creativity. Preceding the percussion band is the *Rainha da Bateria* (Queen of the Drums), who introduces the musicians while greeting the audience. This role is notorious for its revealing costumes and vigorous dancing. The Queen has to be elected, going through fierce competition herself within her own Samba School. This role also requires that the performer have a great physique. Sometimes a celebrity actresses or models are cast for this role. The *Princesas da Bateria* (Princesses of the Drums) are part of an ensemble cast that support and dance near the Queen. Other supporting cast members are actually crews who also wear costumes and “perform.” They have several duties, from pushing the non-motorized floats, to making sure there are no gaps between each section performing, among other tasks. Also, part of
the crew is the Carnavalesco (main designer of the whole production). This designer sometimes decides to perform with his or her Samba School.

**Storytelling in Carnival Performances**

As storytelling is a crucial aspect of overall performances in the Carnival of Rio de Janeiro, it is imperative to examine how the nature, scope, and methods of storytelling developed, altered, and progressed throughout the years of the festival. Besides the creative side of Carnival, the management branch begs an inspection of the past and current productions. Critical analyses of the progression and innovations made and executed that have brought Carnival to its present day’s performative successes and failures will also be studied. These evolutions, changes, and implementations are presently affecting performance and storytelling from performers’ perspectives in various ways. Performance and storytelling in the festival will be explored through social and cultural frameworks via Victor Turner’s theory of “liminality.” Thus, this thesis will explore the various dilemmas Brazil faces affecting how its population manifests itself through the festival.

However, before these areas of inquiry get undertaken, it is essential to address a common question that is heard from time to time: “Is Carnival dying?” According to Maria Isaura Pereira de Queiroz, even though Carnival in Brazil is celebrated in every single city, not everyone, contrary to popular belief, is a fan of Carnival (14). As a predominantly Catholic country, there are many Brazilian citizens who despise Carnival in general, including the Carnival from Rio de Janeiro. These “Carnival opponents” object to Carnival’s excessiveness, from female nudity and excessive substance abuse, to increased violence and death that are sometimes brought about by the Carnival festivities.
Certainly, many of these Carnival pessimists would like to see the death of Carnival. However, for three centuries now, we have heard both Carnival lovers and Carnival enemy nationals ask if Carnival is dying, and time and time again, Carnival has proven to be very much alive and strong. What has been observed instead is the transformation or “death” of some types of Carnival and the emergence of others in their place, supporting Victor Turner’s theory of liminality. Carnival in Rio de Janeiro alone went through various mutations, phases, and transformations. From this thesis alone, one can appreciate the array of different types of Carnivals that took place in Rio de Janeiro throughout the years. Furthermore, Queiroz explains that as society in Brazil changed within these centuries, Carnival followed these changes and radically transformed, not just Carnival in Rio de Janeiro but throughout the entire country (13).

These transformations had different effects on various aspects of the performers, as hitherto revealed. For instance, in the 1800s, an integral cultural transformation of social stratification led to the depletion of certain customs in Carnival, such as traditional balls, dramatic dances, and processions (50). A few years later, in 1840, another metamorphosis in Carnival occurred. The newspapers announced the arrival of Masked Balls to take place at Itália Hotel as hegemonic Brazilians strived to be a civilized society like Europe (51). As previously discussed, Brazilians experienced the death of entrudo in 1904 and replaced by the more elegant and refined Carnival Societies (35).

Just like Brazilians’ taste of Samba Music changed and adapted to reflect what was happening in society, a similar analogy can be argued for the transformational periods of Carnival. Like the Musical Theatre successes in the United States, for example, what became popular by audiences had a lot to do with what was happening in
the nation. When the United States’ population was suffering from either war, or economic depression, spectacles seemed to be popular and they attracted audiences to the box office. When the country was well-balanced and citizens felt secure, audiences were able to endure more serious thematic performances. For instance, the musical *Show Boat* debuted in 1927 on Broadway, right before the Great Depression in the United States. However, before *Show Boat*’s premiere, Broadway audiences were accustomed to trivial or light comedy-musicals and operettas. These revues were notoriously plotless and frivolous, and they dominated Broadway productions from the late 1800s until the early 1900s. The combination of significantly grave issues and some spectacle defined the style of *Show Boat* and was a departure from what audiences were used to. Hence, *Show Boat* changed the course of history in American Musicals. *Show Boat* follows the lives of the characters over a period of forty years. The themes explored in this revolutionary musical were previously considered taboo: racism, gambling, alcoholism, single parenting, miscegenation, divorce, and marital heartbreak (Hayter). Had this musical premiered during the Great Depression, these themes might have been too heavy for an audience who would have preferred to use escapism for entertainment. The storytelling of *Show Boat* reflected the country’s “state of mind.”

Likewise, Carnival in Rio de Janeiro is ever changing to reflect its transformations and different themes; hence, no need to worry about the annihilation of Carnival in Brazil. It is not showing symptoms of a fatal illness, nor is it hinting at extinction. It appears that Carnival will not die any time soon; after all, the Brazilian pride is to be the country of Carnival (Queiroz 12). However, the eradication of certain stories and different themes over the years is expected, mirroring the country’s cultural
ethos as well as social and political state of the union.

From what has been learned about *entrudo* Carnival, one can argue that this form was more about play and rebellion than actual storytelling and performance. As the lower-class participants used pranks to wet each other and any passer-by, *entrudo* is left with more of a ritualist Carnival of humanizing themselves during Carnival days and less concerned with a “plot-line” story to tell. Although *entrudo* used a form of anarchism, this rebellion was still a way to tell their oppressed story. Their way of storytelling echoes Bakhtin’s *carnivalesque* and the pagan-like Carnivals from Greek and Roman times as described previously by Hiram Araújo.

Zé Pereira’s Carnival, even though performed by the lower-classes, did not use the barbaric games of *entrudo*. However, their stories were similar to *entrudo*’s, as they just wanted to be king during Carnival and perform on the street. Conversely, the higher-class Carnival stories involved “impersonating” Europeans and these performers suggested an attempt to show off their wealth and sophistication. By mimicking Europe’s lifestyles, the participants performed in elaborate masquerades and costly costumes. When the higher-class performers took their Carnival from clubs and theatres to the streets, the element of allegorical floats were added. Many times, wealthy families wanted to boast about their refinement to other families. However, in the early 1900s, an innovative idea came about that transformed Carnival forever, and this idea is still utilized today: Carnival themes. As a formidable novelty, the Carnival Societies began performing Carnival via chosen themes, and the stories presented in these Carnivals varied. For instance, in 1906, the *Democraticos* had a successful theme as the group sang about the freed slaves and how bright and hopeful their futures were.
The music and themes of each group were kept under rigorous secret and only the director and the writers were allowed to have knowledge about them. Each group would spy on the other and would try to “one-up” one another in order to present a superior performance (Moraes 102-103). The lower-class cordões of African descent, on the other hand, were known for their storytelling of making fun of the court and higher authorities (Moraes 137-138). Cordões also performed by synthetizing various expressions of their cultural heritage (Ferreira 281-283). They represented cultural dialogues established by the African slaves since their arrival in Brazil (283-284). Like any other Carnival group, ranchos’ themes also varied. In 1929, for example, a rancho’s group by the name of Caprichosos da Estôpa, chose Oscar Wilde’s Salome for a more international theme (Moraes 159). For the blocos, one of the groups “Remembering the Past” stood out in 1914. Their theme reflected their name, nostalgically remembering and honoring past Carnivals of cordões. However, this group also put a modern spin on the theme, singing about and promoting the election of Venceslau Braz, a presidential candidate at that time (Moraes 162-163).

Presently, the Samba Schools’ themes from Rio de Janeiro’s Carnival also reflect the different eras according to the country’s state of the union. As an example, the Samba School named Tuiuti, who took second-place in the 2018 Rio de Janeiro’s Carnival, had the theme “My God, my God, slavery is extinct.” The theme unmasked the debauchery of labor law reform that was implemented in 2017 that negatively affects millions of Brazilian citizens. The School’s performance shocked the nation as its explicit theme blatantly exposed reality from which so many Brazilians are suffering from. The allegories depicted the President of Brazil, Michel Temer, in the upmost negative light as
a vampire. Other *alas* consisted of tortured slaves and the mockery of people who opposed the impeachment of the previous president, Dilma Rousseff, for her corruption crimes ("Sintonia Com Sentimento"). Even through this serious theme, Tuiuti’s performers still managed to passionately and joyfully perform in Carnival while having a cathartic effect of their own right.

Queiroz also claims that the Brazilian national identity is a result of the fusing of different cultures. She calls the “superspectacle” of Rio de Janeiro’s Carnival to be a blend of European, African, and Indigenous cultures and customs, thus reflective in Carnival’s performances and storytelling (58-59). This so-called Brazilian identity is problematic in itself due to racial and social discrimination that sadly runs wild in Brazil. Queiroz asserts that this identity can only be truly conceived when these hegemonies and intolerances are extinguished, hence the cause of much disagreement among scholars. For performance’s sake in Rio de Janeiro, this national identity seems to be accepted during Brazilian Carnival, as performers of different socio-economic classes, races, and ages all perform together in honor of their Samba School. This hybridism reflects the present-state of Carnival transformation, and there is no going back to the past of the primitive Carnivals. Yet, more transformations and adaptions will probably occur, especially if all parties involved benefit from these modifications. If there are clever ways to keep performers and crew safe, create jobs, attract more tourists, and help the Brazilian economy, these adaptions should be welcomed, and Brazilian society will adjust, as they have in the past.
CHAPTER 2: AESTHETIC, STRUCTURAL, AND UNIFYING ASPECTS OF RIO’S CARNIVAL

Rules that Govern Rio’s Carnival

As previously demonstrated, Carnival themes have always been an integral part of the Carnival production. These themes dictate what the production aesthetics will look like, how the performances will be delivered, what allegorical cars will be built, and so on. Themes tell a story in Carnival via each Samba School’s performers. There have been much controversies in theme choosing for Carnival groups. These groups have either had complete freedom to choose their own subjects or subjects have been chosen for them, depending on the presidential era or commercialization influences. Moreover, Carnival groups have chosen an array of different motifs, from nationalist stories to international matters.

During the Great Societies’ Carnivals, themes reflected the wisdom of their creators. Some of the themes of that time were about international authorities such as “D. Quixote de la Mancha,” “Louie XIV’s Court,” among others (Queiroz 51). It appears that these themes reflected Brazilians’ knowledge of what was happening in the world at that time. In the 1930s, the city’s Department of Tourism ordered ranchos to perform national themes, including national characters and national subjects and matters (Moraes 159-160). In addition, the police force was another influence that was dictating what themes Carnival groups were allowed to perform. Police presence in Carnival has been criticized by some scholars; however, police boundaries are necessary to keep people safe, not only to ensure that performances are intact, but also for the spectators’ sake. Eneida de Moraes argues that the police force was an enemy to Carnival because they were placing too many restrictions on group’s name titles, their costumes, and limiting rehearsal dates. She
refers to the police as cruel, terrible, fiercely anti-carnival, and the like. Moraes claims that police used excessive force during Carnival which lead to injury or death of participants. She argues that police turned simple disagreements into wars. She finally asserts that police always provoked conflict and violence in Carnival (244).

Other organizations shared Eneida’s emotions. A newspaper printed that “Brazilians were threatened to have restrictions on their only fun time of the year” (241). Another newspaper headlined that “these prohibitions are very serious, it is a restriction in the Brazilian’s public liberty” (242). Moraes further states that police restricted a few themes and costumes. For example, in 1909, Indigenous costumes were prohibited under Chief of Police Alfredo Pinto. He argued that there were too many weapons that were part of the costume that one could use in a fight, especially since fights were common among the cordões groups (239-242). Law enforcement also placed restrictions to the names of the groups. In 1907, for instance, the police prohibited a bloco to use the word “Republic” as part of its name, claiming that Republic of Brazil was too serious of a subject to be utilized in the name of a bloco group (Moraes 240). Other prohibitions were the use of masks after a certain time of the night. The police feared that people in masks could commit crimes more easily since they were unrecognizable, and individuals could “hide behind their mask” (239).

In 1925, police’s goal was to moralize Carnival. Law enforcement announced to Carnival groups that their music and themes would be analyzed for approval. Both music and themes would be censured (Moraes 243). Police officers also were trying to keep Carnival participants free of aggravation. In 1930, teenage boys engaged in harassment toward female performers by aggressively lifting their skirts when these women
performed in the parades. The police quickly came to the performers’ rescue to intervene (285). It is not clear if police used excessive force toward these boys, but it is clear that police were trying to stop the harassment. If not the police to shield the female performers, then who? There is no evidence of male performers, much less the spectators, trying to guard these female performers. Hence, the police had to take action. Law enforcement was also striving to keep some morality in Carnival by claiming that people had to have some “liberties within order.” Police were to take action against any performer who disrespected families with either words or gestures or by behaving in inappropriate ways (285). Is it possible that law enforcement officers went too far in controlling content of Carnival? It is certainly plausible, yet it is also curious to note that no one in law enforcement seemed to mind the half-naked women performers, no matter what “moral” theme a particular group chose. Nevertheless, it is difficult to determine how lack of police presence would have affected Carnival-goers’ safety, how many injuries or deaths would have been prevented, or how many fights would have been avoided. However, by analyzing Brazilian’s Carnival history of violence, dating all the way back to entrudo, it is fair to say that police manifestation is not only suggested, but also necessary.

Regardless of police involvement, the era of officialization of Carnival prohibited Rio de Janeiro’s citizens from producing and running Carnival as they pleased. Carnival groups could no longer choose their own themes. They had to have a national theme. In addition, there were limitations with budgeting which restricted each group’s yearly production. Moreover, the regulations stipulated some rules on costuming. Performers had to wear certain costumes such as the baiana costume, which became a staple section.
of Carnival from then on. In short, the officialization of Carnival created controlled performances (Moraes 249 and 314). It is argued by scholarship that Carnival suffered not because people rejected the government’s help. Carnival suffered because this help was insignificant. The little funding made Carnival groups turn to a passive mentality. Groups ceased to “fight” for funds from other sources like businesses, other commerce, and friends, like they did in the past. Consequently, Carnival groups settled, and the community ceased to unite forces to raise funds. Hence, Carnival was in trouble (250). Moraes argues that to save Carnival, an organized Carnival commission of Samba Schools would need to have been born to debate with the government and to be Carnival’s advocate (252).

**Costumes, Allegorical Cars, and Other Visuals Elements**

Does Carnival in Rio de Janeiro over-indulge in its visual theatrical aesthetics? Are the costumes, allegorical cars, props, and visuals too excessive? Are these aesthetics exaggerations assisting in telling the story via each group’s theme? To fully understand Rio de Janeiro’s Carnival aesthetic choices of the present times, it is necessary to look back in history. Starting with costumes from the 1900s, it is observed that Carnival performers would often mimic European traditions of countries such as France. However, Brazilians also adapted these European traditions by putting a Brazilian spin on their own costumes (Moraes 123). Still in the 1900s, costumes for Carnival in clubs were mandatory. Moraes argues that it would not be an exaggeration to claim that spectacle in Rio’s Carnival was a result of the mandatory wear of costumes in the clubs, as opposed to allowing Carnival participants to perform in ordinary everyday clothes (114). However, difficult economic times led Brazilians to wear simpler costumes in Carnival. In 1908, a
journalist spoke about Brazilians’ preference to the humbler Carnival versus the extravagant Carnival of the elite (217-218). By 1930, a simple T-shirt and cheap accessories were acceptable costumes for performing at Carnival. In 1957, “anything goes” was the motto as far as costumes, which permitted performers to wear regular clothes (123).

Notwithstanding, the costumes in the balls were still intricate and luxurious, and masks became inexistent (124). Also in 1957, one of rancho’s groups presented “Celebrity Dreams” as their theme. That year, that rancho group spent a fortune on costumes, all elaborate and made out of the finest materials. However, this lavishness came with a price. The group, since receiving very little monetary help from the city of Rio de Janeiro, struggled financially to pay for the whole production. This struggle included financing not only the costumes, but also the rehearsal space, and property expenses, among other costs. Hence, everyone pitched in to make the costumes happen, including friends, directors, members, Carnival admirers, and their families (160). This circumstance is a testament of how Carnival has been a unifier of a community.

It resonates truth when reading the scholar and art critic Mário Barata’s article who claims that “no other national celebration in Brazil concerns itself aesthetically as much as it does when it comes to Carnival” (287). Barata further argues that all visuals, including costumes, masks, or club and street decorations from all Carnival groups signify an “exteriorization of the instinct and aesthetic expression of all involved in Carnival,” including performers and producers (287). Since 1888, artists started getting hired to visually improve Carnival, performing tasks such as preparing the allegorical cars, designing costumes, decorating the clubs, or painting the group’s flag (288-289).
The list of these respected artists grew every year, and they used Carnival as a vehicle to make a name for themselves and to propel their careers.

However, one can argue that Carnival aesthetics cease to support Samba School’s theme when these visuals have a primary agenda. If this agenda is a way to give the artists’ fame and fortune, regardless of the effect it has on Samba Schools’ theme, then it becomes problematic. This agenda focuses less on honoring Brazilian culture and more on monetary rewards. This Aesthetics also become a dilemma when the glitz and glamour are added just for the shine, color and elegance, and for no other reason. Alison Raphael discloses that in 1954, a columnist criticized Samba School’s aesthetics, claiming that Samba Schools were not properly honoring their allegorical cars. He argued that either the Samba School did not have the proper budget to build a quality allegorical car, or that the artists hired to make them did not have enough experience or finesse to build them properly as required by the grandiose spectacle (79). The pressure of this criticism resulted in these Samba Schools employing more professionally qualified artists to keep up with the demands of the judges’ aesthetical criteria with the hopes of performing in a more spectacle-worthy festival.

Thus, it is fair to argue that commercialization of Carnival also affects each Samba School’s budget. These Samba Schools and their performers try to keep up with the remarkable demands to put on a spectacle. According to Raphael, as the floats became more elaborate and the drum sections of each School grew over the years, so did their budget. The amount of properties also increased as well as their quality (79). To illustrate, Portela (one of the main Samba Schools), performed with around a fifteen-person band in 1930. By 1960, this same Samba School’s band consisted of about two
hundred performers. Moreover, in 1930, Portela used mostly home-made instruments, whereas in 1960, the School had to purchase brand-new instruments of high quality (79).

For the first Samba Schools, their costumes were simplistic. The women wore *baiana* costumes and the men wore striped pajamas, overalls, “wife-beater” T-shirts, and straw hats covering one eye, to portray “outlaws” (310-311). Present-day Carnival in Rio de Janeiro is far from visually simplistic. The colors, allegorical floats, costumes, glitter, lights, and decorations fill the Sambódromo and result in an overload of the senses. As beautiful as this sight might be, one can also become desensitized from the visuals in the same way spectators may become “immune” to the over-sexualizing of the female performers. Personally, the memories of watching the Samba Schools perform on television did result in a taxing experience. To this day, as exciting as it is to follow these performances, after a while, these Schools start “looking all the same.” The Schools are all colorful and glittery, with amazingly elaborate costumes and made up dancers. At some point, the spectacular visuals of Carnival in Rio de Janeiro seem like aesthetic masturbations of each Samba School and an optical orgy for the audiences.

Moreover, the floats look different from School to School, depending on their themes, but there are very little surprises as far as their formats. Floats always have a stage for performers to dance on and their *Puxadores* sing their School’s Samba *enredo* along these dancers. Even though the floats are always different from each other, after a while they all start looking similar as well. Some Samba artists agree with this position. A well-known composer by the name of José Inácio dos Santos, who is known by his professional name of Zé Katimba, reminisces about the old Carnival days. He claims that he misses the fact that when Samba Schools won the first prize, it was because they led
spectators into emotional reactions, pulling on their heart strings instead of striving to “dazzle eyes with production” (Branch). The idea of catharsis discussed previously reflects Santos’ analysis. As the composer displays an Aristotelian theoretical perspective of what these Samba School performances should be ensuing from the audiences, one can understand how the exaggerated aesthetics would be a distracting factor from the real issues presented on the Sambódromo stage.

The Exploitation of Women Performers

We have all heard the expression “sex sells” before, and in theatre, the “sex sells” concept is still valid. In popular theatre, especially in Carnival, sex sells a lot of tickets, dating back to the 1800s. Advertisings of Carnival would exhibit women and men performers through daring gestures and sexual images to entice Carnival-goers (Moraes 283). Moraes argues that Carnival has always been infamous and unruly for the displaying of lewd exhibitions and obscenely dressed women (283). Pictures of nude women and couples found in “compromising positions” were easily found in magazines and newspapers of various years (285). In 1889, the obscenity of costumes and sexuality was so overt that a respectable man published an article for women not to pay attention to these seductresses (283). It is not clear why the author chose to tell “women” and not “men” to look at these other scandalous female costumes, but one could deduce that he was trying to keep these warned “respectable women” innocent and pure.

Similarly, women exploitation in theatre is nothing new. From antiquity and still to the present days, women are exploited on stage regardless of the theatre genre, such as Musical Theatre, Drama, Comedies, and popular theatre forms such as Carnival. When it comes to female performers, some would argue that we have made positive strides in
regard to the exploitation tribulations of female performers – but is this really a true statement? Societies in general, including Brazilian society, have come to accept that theatre leaders and investors use the notion that “sex sells” to generate a high return on their investment, and Carnival in Rio de Janeiro is no different. Comparing Carnival to other forms of theatre as an example, it is observed that the history of American Musicals mirrors some of the quandaries faced by Carnival in Rio de Janeiro regarding female performer treatment. The Musical Theatre genre is here chosen for comparison for its dynamics of music, dancing, and acting that make up the most similar style of theatre in comparison to Carnival.

Dating all the way back to what is considered the first American Musical, *The Black Crook*, theatre producers and investors promptly grasped the idea that the display of attractive, half-nude, or sometimes fully-naked women on stage guaranteed an increase in ticket sales; thus, investors capitalized on the opportunity to profit. Fortunately for Musical Theatre, these objectifying and demeaning roles are not the only kinds of roles that are available for female performers. Hence, women in Musical Theatre have an array of choices for roles, in spite of the challenging and complex casting process to be chosen for these roles. Such respectable female roles reflect, for instance, all reputable and fully-dressed female characters in the musical *Oklahoma!* This illustration proves that it is not necessary for actresses on stage to be degraded or physically exposed in order for the production to become financially successful. Granted that the role and value of female performers on stage has progressed throughout theatre history, their objectification still proves to be a major affliction, especially in Rio de Janeiro’s Carnival.
In analyzing the history of female performers in theatre, one could argue that troubles and challenges for these hopeful actresses were already present dating back to antiquity. It is well documented that women from ancient times were not allowed to participate in theater, let alone perform on the ancient stages. During Greek and Roman epochs in theatre, women were portrayed on stage; however, these female roles were played by male performers. Academics such as Alan Hughes claims that the notion of women of the Greek theatre was an oxymoron, making the argument that women were inexistent in ancient times. He further asserts that women were played by male actors even as dramatic characters (1). In academia, the “invisibility” of female performers in Greek and Roman Theatre has been accepted history; it is axiom that female performers did not engage in Greek and Roman Theatre. Nevertheless, there is some conflicting evidence that proves differently. There are some significant documents, such as explored art work, that present evidentiary support that women did partake in ancient theatre in some minor capacity as acrobats, mimes, musicians, or dancers (4). Although there was female participation on stage, these female roles were considered unimportant. These non-speaking, supporting roles played by women did not fit the classical Greek tragedies or comedies; thus, these roles were considered irrelevant to Greek drama (4). Worse yet, aside from these female roles being considered “inferior,” these female performers participated in strip-tease or performed in the nude, adding to their humiliation (15-16). The scholar Live Hov substantiates this argument by confirming that most of the women on stage performed more or less naked (135). However, there is some academic dispute whether this female nudity on stage was counterfeit or genuine. Nevertheless, it would be difficult or futile to negate the evidence from the analyzed art, which have been studied
by reliable sources. These art pieces clearly depict the naked female acrobats as well as the topless female tumblers displayed in the paintings, veering us to the path of the “naked truth.”

If this predicament for female performers was not debauched enough, another layer of exploitation of women in theatre came into play. Scholarly evidence reveals that regrettably, many of these female performers, were also in the prostitution business (18). Hov further provides confirmation that aside from both Roman and Greek female performers being involved in prostitution, it was also accepted by ancient society that these female performers were obtainable for sexual employment (140). Hov also discusses the theory of the gaze, presenting “how the female performers of antiquity were the first ‘objects’ of the gaze, which in turn contributed to the persistent notion of the promiscuous actress” (129). In this argument, Live Hov refers to both Greek and Roman theatre, explaining that in antiquity, women were prohibited to be on the professional stage, especially in theatre events that were not subsidized by the state (130-131). Therefore, actress participation on stage was deemed a low status activity given the notion that these female performers were not considered professional (134).

In Rio de Janeiro’s Carnival, this idea of the female performers being the subject of the gaze is a prominent hindrance. Although not necessarily leading these female performers into prostitution, spectators of Carnival, whether national audiences or tourists, feast their eyes on the semi-nude women of Carnival, whom have very little, if anything, to do with the Samba School’s enredo. I remember very vividly watching Rio de Janeiro’s Carnival on television with my family, which is a “mandatory event” for a Brazilian if he or she cannot personally go to Rio de Janeiro to watch it live. It was very
uncomfortable watching these almost-naked women performing for their Samba School with my family, especially with my father and grandfather sitting right next to me. Perhaps worst yet, it was very distracting to understand what story the Samba School was trying to tell when all the vulgar sexuality was being flaunted in our faces. The lack of clothing is so pronounced for every single Samba School, that one would think that spectators would become desensitized or bored. Yet, I almost never hear any heterosexual man complaining about this issue. The fact that this exploitation of women’s bodies is only useful for serving as aesthetical bait, not helping propel the story of each Samba School, is disturbing and unfortunate. It also deems a grand disservice to the popular theatre genre.

The issues of exclusion and later the objectifying of female performers and their nudity in Rio de Janeiro’s Carnival have proven problematic since the beginnings of Carnival. For the Great Societies, the participation of “respectable family women” in Carnival was rigorously prohibited (Queiroz 52). These women were excluded from all Carnival matters, both as administrators and performers. Women were only allowed to participate in Carnival during controlled events such as family balls and matinee parades. The first masked ball geared toward family ladies occurred in 1855, where women could take part in the Carnival instead of being just spectators (Moraes 47). Also, at first, the Societies’ men wanted to display their women half naked dancing on top of the allegorical cars, but later they became jealous and did not want to share their women’s bodies during Carnival. Hence, they needed to recruit random women to be on “display” and not only pay for their costumes but also convince them to perform (Moraes 104). These random actresses performed in balls that took place in theatres, and they were also
featured in the allegorical cars, flaunted and blowing kisses at the spectators (Queiroz 52). It is not surprising that Societies’ men did not want their ladies mixing with these actresses. In history, Maria Isaura Pereira de Queiroz explains that the Societies’ men referred to their wives as “honest women” and the actresses as “prostitutes,” explaining that the “honest women” were kept away from spectators’ views, inside the allegoric cars, whereas the “prostitutes” were ostentatiously exhibited for the audiences to enjoy (52). Worse yet, single women felt they could get ahead in society in general or move up the social hierarchy if they could catch the attention of a wealthy Carnival performer from a Society (53).

Women in Carnival have always been objectified, even through the promotions and advertisings from newspapers and magazines. All through Carnival history, there was marketing involved, whether it was to let the Rio de Janeiro citizens know where to buy costumes, Carnival toys, and accessories, or to announce and promote certain clubs that were holding Carnival performances (Moraes 263-281). In 1925, a particular promotion for Copacabana Hotel enticed citizens to experience what they claimed to be “the most sacred and indispensable part of Carnival: the woman.” In the same breath, the advertisement described such women as “modern mermaids, highlighting their beautiful hair, waist lines, and lips (277-278). The wording of the advertisement was peculiar, as it continued, “the people show their eternal beauty, and we honor these women” (278). Even though the advertisement seemed innocent enough and somewhat complementary to women, it is important to note that it strongly focused on women’s beauty and sensual bodies, and nothing else.
Female performers also suffered from harassment during Carnival. In 1930, a reporter observed boys twelve to eighteen years of age lifting women’s skirts as the ladies performed on the parades (285). The boys’ actions seemed harmless to spectators and even fellow performers, but this type of female performer treatment is unacceptable and can easily escalate to more serious and damaging accounts.

Fast forward to the 2000s, often the argument that Samba Schools performers englobe people of all social classes, and that during Carnival, these social class tiers are “abolished” is still relevant. Even more boldly, some critics assert that during Carnival performances, women are treated as equal to men in the misogynist Brazilian society (Osava). However, in analyzing the performances of female roles in the Carnival, a contrasting argument can be made. To substantiate, one of the most vital female lead roles in Rio de Janeiro’s Carnival is that of the Rainha da Bateria (Queen of the Drums) previously discussed. A crucial stipulation for a Queen to be chosen for this role is that she must not be modest in exposing her amazingly curvy and sensual body. The Queen also must wear visually stunning and scanty costumes (“The Samba Parade”). The Princesas (Princesses) dancers also contribute to the visually-alluring aesthetics that make Rio de Janeiro’s Carnival so appealing to many audience members, including Brazilian locals, Brazilian nationals, and international tourists. Princesses’ costumes are typically meticulous and showy, and their main purpose is to feature their voluptuous physiques. Some of these Princesses costumes fully expose their breasts, while some of their tops hardly cover their nipples. Furthermore, the bottoms of their costumes are just as scandalous. Princesses usually perform in a “thong bikini,” displaying their entire buttocks, which exacerbate the international notion that every single woman in Brazil
walks around in these types of swimwear at the beaches (I have been asked that question time and time and again). Worse yet, as these performers dance vigorously during the festival in such small-sized bottoms, sometimes these bottoms shift, causing part of their vaginas to momentarily slip out of their costumes.

However, not every single role in Rio de Janeiro’s Carnival exploit women’s bodies. Fortunately, there are some rare exceptions of respectable roles for these ladies, and a particular honorable role is of the Flag Bearer. Since the Flag Bearer is one of the most crucial female lead roles in Rio de Janeiro’s Carnival, her performance, along with the Samba Host, sets the tone for that particular Samba School, since it is one of the first appearances that lead the rest of the cast. The Flag Bearers’ costumes are sophisticated and typically respectable, featuring colossal dresses that are made from expensive and good-quality materials. Their costumes additionally include beautifully designed head dresses, which are also massive, complex, and visually stunning. Nevertheless, some Flag Bearers regrettably dress provocatively, wearing the “staple” Brazilian “G-string” bottoms that emphasize their curvy bodies.

Furthermore, in the overall Carnival of Rio de Janeiro, most of the female performers’ costumes are designed to expose their bodies, similarly to the Ziegfeld Follies chorus girls from the American Musical Theatre performances from the early 1900s to the early 1930s. Florenz Ziegfeld, who at the time was the most influential producer of Broadway musical, was notorious for casting beautiful “chorus girls” and producing spectacular and excessively gaudy revues. These scantily-dressed girls did not have much to do with a plot of the show. Their only purpose was to serve as aesthetical appeal to the spectators (Hurwitz 83-87). Likewise, the same type of body exploitation on
the Carnival stage, once again, has absolutely nothing to do with the theme of each Samba School, thus compromising the Samba School’s storytelling abilities. Female performers are only used as “eye-candy” to audiences, and analogously to the Ziegfeld Follies revues examined, these performers are only exploited for their sexual aesthetics in order to generate profits for the city of Rio de Janeiro.

As previously discussed, Carnival has become an immense profitable business aside from being part of the biggest Brazilian cultural tradition (Pinto). Moreover, as Brazilian nationals come to Rio de Janeiro to experience Carnival, international tourists also travel to Brazil to indulge and be a part of this ostentatious aesthetical festival. During Carnival time, this tourist traffic results in Rio de Janeiro’s Carnival producing high profits of around a billion reais (at least a billion dollars). RIOTUR expected approximately one million tourists for Rio de Janeiro’s Carnival in 2017, thus estimating profits of around three billion reais (approximately one billion dollars), generated from tourism alone at Carnival time (Brasil). It is not shocking to realize that the exploitation of these female performers in Carnival serves to attract profits.

There are some critics who claim that Rio de Janeiro’s Carnival liberates Brazilian women from being oppressed, thus creating a sense of social equality in Brazilian society (Osava). Nevertheless, this claim that female performers benefit the most from this oppression is highly questionable. By “respecting Carnival traditions” and encouraging female performers to expose their bodies in a way that does not contribute to storytelling in Carnival, how can one justify this so-called women’s empowerment and equality? For these female performers, genuine emancipation must come from other means of participation in Rio de Janeiro’s Carnival. For performance and storytelling
points of view, these female performers should not have to be sexualized in order to contribute to Carnival’s performative successes.

Currently, more and more women are partaking in the decision-making and creation of Carnival production by accepting management positions and being part of the creative team. If their male heterosexual counterparts have ulterior motives to keep the female performers in little clothing, then I am hoping these female supervisors will start demanding and fighting for a better cohesive story-vision and more congruent performances. Only then will female performers be empowered and equal to the hegemonic male-dominant culture of Brazil.

Rio de Janeiro’s Carnival Tourism

Tourism in Rio de Janeiro is an undeniable force that keeps the city economically alive. Carnival tourism is a major contributor to the success of this over-all economy boost, making its mark all the way back to the 1900s. In 1926, a pioneer American travel agency by the name of Lamport & Holt Line, promoted Carnival to tourists for the first time (Moraes 133). In 1932, Rio de Janeiro’s Mayor Pedro Ernesto created the Departamento de Turismo da Prefeitura (City’s Department of Tourism). Eneida de Moraes argues that the officialization of Carnival, claimed by many to have weakened Carnival, should not have been created for tourism’s sakes. Instead, this officialization should have served the Carnival participants and eliminated its shackles of bureaucracy that regularly impairs Brazilian’s lives and their Carnival (325). Moraes further maintains that more liberty is what Carnival needs, instead of more restrictions. Alison Raphael explains that another problem emerged when President Juscelino Kubistschek led Brazil’s government and decided to move the capital of Brazil from Rio de Janeiro to the
city of Brasilia in 1960. Affected by financial strains, the city of Rio de Janeiro had to lean on tourism more heavily to meet its economic demands (78 and 80). Government officials felt that Carnival was an obvious choice that could bridge that fiscal gap. Thus, these officials began financially assisting Carnival productions more substantially. However, as enticing as it was, this assistance came with consequences. Samba Schools, in turn, were pressured into producing bigger, better, and more beautiful spectacles to attract tourists.

Carnival prizes also got more enriched, therefore increasing the competition aspect of these performances (80). Furthermore, tourist attraction added more pressure on the performances of each Samba School. In order to avoid boredom from the tourists, some rules were implemented. This affected not only the performers in the actual festival, but also other cast members as well. The rule that stipulated how long cast members had to perform from “point A to point Z” was heavily based on tourists’ enjoyment of the festival. This rule was set to avoid gaps between each Samba School’s performance and to avoid having the tourists waiting around between performances. Unfortunately, this regulation was responsible for Samba Schools having to deny some of their members to perform. This decision was manifested in order to keep a sound number of performers, hence not taking a chance that their overall performance would run too long. If that were to occur, points would be deducted and this in turn would compromise the Samba School’s chances of winning (80). If anyone has learned anything about Brazilians’ passion to perform in the Carnival, one would understand the gravity of this situation. These members had been preparing all year long for their performances, living and breathing in their Samba School’s domain, only to be denied the right to perform.
A perfect illustration of Brazilians’ passion to perform in Carnival is reflected in a Samba *enredo* called “É hoje” (It’s today). Didi and Mestrinho composed the song the Samba School União da Ilha do Governador performed it in the 1982’s Carnival of Rio de Janeiro. This amazing, contagious, and energetic song is one of the best known and most loved Carnival songs of all times. Having performed this song many times, I can attest to the ecstatic effect it has on audiences. Spectators cannot help but sing along and dance to its infectious beat. Being blessed by this song, either by performing it or being in the audience, the experience is truly like getting a shot of adrenaline or drinking many cups of Brazilian coffee! There is no Brazilian who is unfamiliar with this song. One of the most popular versions was sung by beloved Brazilian singer Caetano Veloso, featuring Maria Bethânia. The lyrics of this song reflect exactly what it meant and still means for Brazilians to perform in their Samba School:

A minha alegria atravessou o mar
E ancorou na passarela
Fez um desembarque fascinante
No maior show da Terra
Será que eu serei
o dono desta festa um rei
No meio de uma gente tão modesta
Eu vim descendo a serra
Cheio de euforia para desfilar
O mundo inteiro espera
Hoje é dia do riso chorar
Levei o meu samba
Pra mãe-de-santo rezar
Contra o mau olhado
Carrego o meu Patuá

Acrediito ser o mais valente
Nesta luta do rochedo com o mar
(E com o mar)

É hoje o dia da alegria e a tristeza
Nem pode pensar em chegar

Diga espelho meu
Se há na avenida
Alguém mais feliz que eu (“Samba Enredo”)
Who knows if I’ll be
the owner of this party, a king
In the middle of such modest people
I came descending from the slums
Full of euphoria to perform
The whole world awaits
Today is the day for the laughter to cry

I brought my samba
For the mother-of-saint to pray
Against the evil eye
I carry my Amulet

I believe I’m the bravest
In this fight of the rocks with the ocean
(And with the ocean)

Today is the day of joy, and sadness
Can’t even think about arriving

Tell me my mirror
If there is anyone on this parade
Happier than me
Tourism also provoked another strain in the Samba School communities. It affected the financial pockets of their own Samba School members. As the expenses of production increased, Samba Schools became more creative in order to generate profits. Certain established Samba Schools started getting creative on how to raise funds for their School. They made extra capital by selling tickets to outside citizens to watch their Samba School rehearsals. These Schools also sold alcoholic beverages to anyone willing to purchase them, both their own School members and the outside visitors. The Schools also rented chairs and tables to whomever could afford them. After the Schools were somewhat financially stable, they finally started building their headquarters near wealthy neighborhood to attract the elite’s financial support (80). As a result, Samba Schools’ members’ bond and support slowly started dissipating as these Schools became more and more intertwined with the elite’s financial dependability, counting less and less on their own members. Hence, the dynamic of performer-School relationship changed (80-81).

As a consequence, two novel factors came into play. First, by the end of the 1960s, the elite started performing in the Samba Schools. Secondly, the elite started taking leadership positions within these Samba Schools. This new leadership, in turn, transformed the subtleties of what was once known as “organic groups.” These outsiders started making decisions that were once a collaboration among original Samba School’s members. These decisions included what theme the Samba School would perform as well as what choreography would be performed. They also decided on the aesthetics of each School, which included lighting, allegorical cars, or any other visuals elements.

As if these tumultuous changes were not enough, the elite also felt the right to cast themselves as some of the principal performers in the festival (81). Some of these new
outsiders were highly compensated for their efforts, whether choreographing, designing, or managing the Samba Schools. However, a prominent crisis with this elite Carnival hegemony is that the original members found themselves struggling to pay for their costumes that were previously more affordable, once again changing the dynamic of the Samba Schools’ customary roots. In turn, this dilemma presented a social class dichotomy within Carnival conventions. Fortunately, Samba Schools can currently provide costumes for most performers. However, these performers have to return these costumes as they are properties of each Samba School.

Raphael presents a study published in 1969 that critically analyzed Carnival’s “elite-infiltration” (81). This study concluded that Samba Schools became inauthentic. The School members were not representative of the Brazilian lower-classes, and this notion clashed with the fact that the elite transformed the performances to refined productions that only reflected the wealthy. Thus, these Samba School performances lost their spontaneity and became pretentious (81). Another argument the study brought to light was the loss of the ensemble feel of Carnival and the rise of “diva” attitudes that resulted from the need of attention of certain individuals. Performers became greedier for the spotlight instead of having a desire to tell a story through a theme in a collaborative way. These performers selfishly only thought of themselves and how having a principal role in Carnival would benefit their own careers (81).

Notwithstanding, there are Samba School members who disagree that these outsiders have had a negative effect on Carnival in general. Some perceive this elite attention as a sign of prestige for their particular Samba School (82). An older Samba School member had a prideful glow when illustrating how the Samba Schools were
presently cultured. She explains that in the beginning of Samba Schools, anyone could be
president of a Samba School, even if this person was illiterate. However, the present-day
productions require a team of professionals to handle the Samba School’s businesses.
These professionals, according to her, make up the Samba School’s various Departments
such as cultural, legal, social, and financial. In short, she affirms, without these
professionals, the lower-class School members would not be able to handle the
productions (82-83).

Aside from these alleged benefits the Samba Schools appreciated, many Samba
School members were personally affected by this commercialization. For instance,
Raphael describes how distressed some Samba School members had become. A Samba
composer confessed that he could not just make a samba. He argued that a samba is
organically written and the fact that he is now “told” to write a samba about a theme is
absurd. Samba has to be inspired spontaneously and not forcefully, he vents. In addition,
a Samba School dancer complained that she used to be a principal dancer, and she was
able to make her own costumes. After this commercialization business, she could not
afford to come up with such expensive costumes, so she was “forced” to only be part of
the ensemble (82). Here, her anguish of having been “demoted” to the ensemble is
different than not willing to be a part of the overall storytelling in a cooperative way. The
reason she had a principal role before was because she had earned that role with her
abilities, “elected” by the members of her own Samba School. Hence, it is understandable
how being downgraded to the ensemble would have felt unfair to this performer.

By the late 1970s, Carnival performers finally accepted the infiltration of the elite
in both Carnival production and performance. As Alison Raphael argues, Samba Schools
“had become profit-seeking microenterprises rendering services by contract to the city’s tourism agency” (83). Therefore, the solid foundations of extemporaneous, indigenous, organic, authentic, collaborative, and informal that once described Carnival in Rio de Janeiro dissipated into the massive sophisticated productions that have carried on until today. What once represented Brazilian popular culture of the lower-classes became interwoven with the elite’s impositions and demands of production and performances. This hybridity and crystalized combination of classes thus formed a new “popular culture” that is now accepted not only by Brazilians, but that is also expected by businesses and tourists world-wide.
CHAPTER 3: COMMERCIALIZATION OF CARNIVAL IN RIO DE JANEIRO

The Impact of Commercialization on Storytelling and Performance

The world is ever changing. Technology advances, world and national crises transpire, social media create new platforms, jobs change, societies advance, tastes in theatrical forms and conventions change, and so on. However, certain traditions are considered sacred for good reasons. Some scholars argue that once changed, if not for improvement’s sakes, these traditions may suffer, affecting the roots of Carnival in a negative fashion. Other academics present commercialization in a positive light, arguing that commercialization is what makes Carnival of Rio de Janeiro successful. Hence, there is dilemma and controversy among scholarship regarding the commercialization of Rio de Janeiro’s Carnival.

Eneida de Moraes claims that commercialization of Carnival dates all the way back to the cordões and ranchos eras (229). In their epoch, Carnival producers used the “Livro de Ouro” (Golden Book), which is a book that was used among Carnival groups to collect monies from local businesses. However, the business owners did not treat their donations as financial investments. Although assisting in the financials of Carnival, these businesses did not ask for anything in return; they were merely content with contributing to Carnival’s theatricality and successes. These businesses consisted of both start up or well-established companies. Furthermore, the owner or presidents of these companies were not the only ones financially contributing to Carnival. Their employees as well as the local residents were also great supporters (229-230). These businesses were also encouraged to decorate their places so that when the groups would parade on their streets the decorations would become part of the visually beautiful aesthetic shine of Carnival
This concept is very similar to Christmas in the United States, where a certain street is highly ornamented by their residents. Sometimes streets “compete” with one another to make sure their street is the most beautifully decorated. If one of the neighbors dares not to participate, neighbors might be inquisitive and upset. The same would happen at Carnival, where certain businesses that did not put much effort into their decorations would get questioned by all involved (232).

The undercurrents of Carnival harshly changed in 1932, when Carnival became official by the government and Carnival groups depended on the government for financial assistance. Hence, Carnival’s economic dynamics also changed. Businesses retracted their investments and the Golden Book became extinct (Moraes 224). To make matters more challenging, the government did not help much. Brazil’s government has been infamously known for its “empty pockets,” especially when it comes to providing financial assistance to the people. Consequently, Carnival groups struggled (Moraes 233 and 244). Moraes also explains that Brazilians felt that because Carnival was a public event, both the Federal and Municipal governments had an obligation to financially assist Carnival groups (244-247). Brazilians pleaded with the government, claiming that the relationship was a “two-way street.” Citizens asserted that this relationship should be reciprocal: the government should help Carnival, and in return, the people would help the country maintain a patriotic art of national reconstitution (246).

During the dictatorship years, from 1930 until 1945, President Getúlio Vargas appointed Mayor Pedro Ernesto. Ernesto decided to legitimize the Samba Schools in order to gain a better control of the Carnival in Rio de Janeiro (Raphael 77). The Mayor presented these Samba Schools with some funding in exchange for their compliance to a
few rules. For starters, it was mandatory that the Samba Schools registered with Rio de Janeiro’s police and obtained a permit to perform. During this registration, Samba Schools also had to reveal an acceptable School name as well as the names of all persons involved in the decision-making of these Schools such as producers, directors, and managers. The reason for this scrutiny regarding the School’s name is because in the past, sometimes Brazilians would choose a lewd or sexual title for their School name. These names were inappropriate to display for families and tourists, especially since there had (and still has) been a “loose” age minimum for people to either perform or attend Carnival performances. Children have always been involved in Carnival as well. In Rio de Janeiro, the minimum age recommended for children to be part of the audience in the festival is five although it is highly doubtful their identification is checked.

Another significant rule in the Vargas presidential years was that Samba Schools had to perform their *enredo* to reflect a Brazilian historical figure or major national event (77). Surprisingly, the *morro* Samba Schools, by moving their performance to downtown Rio de Janeiro, met Ernesto’s demands positively. There was an atmosphere of teamwork and reciprocated support that nurtured the early years of these Samba Schools. Samba School leaders felt that it was important that Samba Schools were growing and that there was a sense of community. Each Samba School’s members were united and dedicated. No matter how underprivileged they were, these members always made sacrifices (even going hungry), and they found a way to support their Samba School by whatever means. It is not surprising to notice that each Samba School grew organically from their own local neighborhood. The members of each School understood one another, and they agreed with each other on all matters (77-78). However, the fundamental disposition of
these Samba Schools changed, and this change occurred when the rules and regulations were imposed on them starting with the Vargas era. In the long run, these transformations led to much disharmony within Samba Schools. Alison Raphael presents an interview from an elderly Samba School member who confessed that “in the past, the groups were not organized like today, and that people wore whatever they wanted. There was no pressure because these members performed Carnival however they wanted.” This elderly Carnival veteran claims that “he does not believe that Carnival performers of today have as much fun as they did while he was in the peak of his Carnival performance days” (78).

During these years of the Vargas presidency, informal Carnival groups turned into “small businesses controlled largely by outsiders” (78). The competitions among Samba Schools went into a period of transformation. To begin with, the monetary prizes increased therefore becoming more substantial. Samba Schools became more eager and driven to win them, which resulted in a dynamic shift among all Schools. In earlier days, Samba Schools would help other Samba Schools in the spirit of fraternization, cooperation, and collaboration. There was a sense of aiding each other, helping each other grow, and assisting each other however they could. However, with this new type of competition for prizes, Samba Schools became more selfish, therefore creating a lesser friendly environment (79). Moreover, Samba Schools were no longer able to perform however they pleased, as earlier groups did. The pressures of Carnival began creeping up. One of the pressures was to win the title of “best Samba School of the year.” Another burden was to create performances that met with the judges’ criteria. Hence, the pressure of financially producing a spectacular enredo weighed down on performers and producers. Commercialization also pressured Samba Schools into trying to entice
eminent dance performers from other Samba Schools. This transaction always came with a price such as causing budgetary spikes for the particular “tempting” School as well as creating animosity among Samba Schools (79). It also became customary for Samba Schools to compensate disk jockeys for playing their samba theme song on the radio, thus affecting the Samba School’s promotional budget (79). To illustrate this point, in 1977, one disk jockey revealed that “this competition had turned into war, where the best soldiers would win.” He further divulged that if the Samba School had more money than the other, the disk jockey would accommodate the ‘richer’ School’s needs” (79).

Conversely, some scholars feel commercialization has brought positive advantages to Carnival. According to Eneida de Moraes, commercialization of Brazilian Carnival has led industry sponsors and investors to become Carnival’s “best friend.” The stable collaboration of the people of Carnival and the force behind the best Carnival productions makes Carnival in Rio de Janeiro the best Carnival in the world (211).

Indirectly, the media was (and still is) also responsible for Carnival’s theatrical successes by highlighting Carnival on the news, interviewing the performers, promoting competition among the groups, and awakening interest for Carnival in Brazilian people’s hearts (211-212). Even if a certain newspaper did not support Carnival and it did not speak highly of it, this newspaper still helped raise Carnival’s popularity (213). After all, bad publicity is still good publicity as the saying goes.

Competition and Its Commercial Impact Upon Carnival

“Keep your drama on stage” is a common phrase heard among theatre practitioners. This phrase signifies the importance of keeping cast and crews’ personal problems and “dramas” from interfering with their professional work. In Brazil, personal
and theatrical dramas are often intermingled and crossed, especially during Carnival. To make matters worse, violence in Brazil is sadly a normal occurrence. Having been a victim of a car-jacking event at gun point when I was a teenager, I know first-hand that Brazilians, who are so well-known for their friendliness and amazing hospitality, are also capable of committing atrocious acts. During Carnival, these violent manifestations are an extension of Brazilians’ everyday lives and struggles. These manifestations often result in problematic consequences during Carnival’s performances.

It has been established that during the entrudo times in the 1800s, entrudo participants were known for playing violent games that led to injuries and death. Entrudos violence preceded Carnival groups, including cordões, who also fought during the festive days, resulting in many wounds and deaths (Moraes 116 and 145). Carnival competition has also often contributed to increased violence. In addition, competition has been the source of various problems during the festive days. In the past, however, competition in Carnival did not have as much emphasis.

The first Carnival competition started with the cordões in 1906. There were prizes for the best dressed, the most original costume, and so on. However, there were so many groups of cordões by then that the organizing party had to come up with more prizes. Producers also had to award various honorary mentions (142). Furthermore, commercial entities incentivized competition for groups’ best flag. This enticement was promoted not just for the cordões performances, but also for the Carnival clubs and the Carnival Societies (144). These competitions seemed innocent enough; however, problems arising from competition started to escalate. In 1909, when Fenianos lost the competition for the “best Carnival” title, the group members protested and aggressively demanded a recount.
of votes (221).

*Ranchos* also engaged in competition and there were deadlines to enter the themes for their performances (156-157). In 1909, a popular Carnival club by the name of High Life promoted a competition. High Life producers presented awards to the best-looking woman, the best costume, and the best dance. The prizes were expensive jewels, but it is curious to note that only men could vote. Journalists and businesses also played an integral influence in stimulating competition among Carnival groups, as these competitions helped their businesses become more profitable (Queiroz 53). It is not surprising to discover that these journalists and businesses were the biggest sponsors and donators for prizes of these competitions.

Competition among present-day Samba Schools is a very significant aspect of Carnival performers and spectators. When Samba Schools first formed, they used to meet at Praça Onze Square to play music, and they also used that time to work out their differences. Very often, Samba School members used knives, sticks, and other dangerous tools to fight. (Moraes 311). These members even used their musical instruments as weapons. Sadly, this overall type of violence became usual and even accepted during Carnival as well.

In 1937, the first competition of Samba Schools took place (249). Carnival judges encouraged Schools to compete for prizes. This competition also stimulated rivalry among Schools and it further “promoted” violence. With the foundation of the Samba Schools’ union in 1952, Samba Schools became more organic and less representative. This development made it possible for old hostilities to turn into healthy competitions. Additionally, Samba Schools created a tradition of disciplined regulations of Carnival
championships overseen by the city of Rio de Janeiro (311).

The judges who were chosen to vote for the best Samba School were all artistic, and they came from different specialized creative professions. There was always a maestro who judged the drum orchestra, music, and the melody of the Samba music. A painter or sculptor judged the allegories, lighting, and the Front Commission performance. A journalist or writer judged the enredo and the lyrics of the Samba Music. A seamstress judged the costumes and flag of each Samba School. Finally, a choreographer judged the overall dancing (314). In 1957, Eneida de Moraes argued that these judges did not necessarily understand Carnival or what it meant for its citizens of Rio de Janeiro. Thus, Moraes did not feel that these judges were chosen justly (314). Edison Carneiro agreed with Moraes, saying that these judges should have been chosen by people who had a close relationship to Carnival, including folklorists, artists of the “people,” or popular musicologists (314). Moraes further ridicules the prizes for the winning School, claiming that the monetary value to be won did not even come close to what each Samba School spent for production (315).

In addition, competition for Samba Music has also had an extensive history. In 1919, the first song competition took place, with a financial agenda. But it was not until 1930 that song competition became full-force (195-196). By then, commercialization of music for Carnival had become established. This music commercialization became the city of Rio de Janeiro’s business model prototype. Hence, as Moraes argues, Carnival became an industry (196). Moreover, this commercialization conceded prizes for the songs instead of incentivizing the musical composers. This paradigm provoked a fierce competition among composers and other Carnival enthusiasts, creating a hostile Carnival
environment (196).

For today’s Samba Schools, competition is fiercer than ever. The book of regulations for Samba School performances is a complex twenty-page document. The organization that is responsible for these regulations is the Samba School’s alliance called *Liga Independente das Escolas de Samba do Rio de Janeiro* (LIESA), which translates to Rio de Janeiro’s Samba Schools’ Independent Union. RIOTUR, the municipal organization for tourism in Rio de Janeiro, is the show runner of the event. Conversely, LIESA is responsible for all artistic direction of the performances, led by LIESA’s president, vice-president, and the Carnival Director. Four commissioners report to these leaders: Concentration, Timing, Dispersal, and Rules-Inspection Commissioners. Each commissioner is in charge of different aspects of production. As an example, the Timing Commissioner is responsible for clocking the performance timing of each Samba School.

In 2018, thirteen Samba Schools performed. Seven of them performed on Sunday, February 11th, and the remaining six performed on Monday, February 12th. Specified times for performances are given for each Samba School, and if a Samba School fails to perform on its given day and time, there are many consequences. These consequences are vast including Samba Schools’ return of any monetary assistance received with interest to LIESA, as well as paying LIESA any expenses created by the Samba School’s absence. There are also many financial penalties, and the absent School becomes banned from Carnival for three consecutive years.

Each Samba School must perform between sixty-five and seventy-five minutes. If a Samba School does not perform within this time limit, it loses one tenth of a point for each minute under or over. Watching the performances of these Samba Schools on
television and following the journalist’s narrations of how much time left a particular Samba School has to perform is nerve-wracking. My family and I have always agonized over this timing issue. We cheer for all the Schools to do well, even if we root for our own favorites.

Another regulation is the number of performers allowed for each School. Samba Schools must have at least two hundred musicians in the Bateria (drum) section, and between ten and fifteen performers in the Front Commission section. The section of Baianas must contain at least seventy performers. Also, men (except directors, as long as they do not dress like Baianas) are prohibited in this Baiana section, which is an interesting concept. It is unclear why male performers are not allowed. Perhaps one can speculate that Baiana being a “feminine word” and referring to female performers, it can only be performed by female dancers. Also, because this Baiana section is considered respectable, Carnival organizations pay homage to this Brazilian tradition; one can hypothesize that Carnival officials do not want to provoke mockery to this section by men dressing as women. For every deviation of these rules, half a point is deducted from the Samba School. The number of total performers must be between two thousand and five hundred individuals and three thousand and five hundred for each Samba School.

The next rule is ironic. LIESA does not allow performers to expose their genitalia, whether explicitly, decorated, or painted. It is not clear if LIESA is referring to both male and female performers or only to males. The irony for me comes from watching Carnival every year and seeing female private body parts quite often. Moreover, there is always a memory of seeing a completely nude female performer covered in body paint. The woman’s private parts were somewhat hidden from the body paint, but they were
certainly there!

Additionally to performative rules, there are also deadlines that Samba Schools have to abide by. A few months before Carnival, Samba Schools have to turn in the synopsis of their *enredo*, along with their Samba musical lyrics. Furthermore, the Schools have to justify their *enredo* as well as provide their historical significances. Last, the themes or allegories must not contain religious cults.

There are fifty-four judges, and there are nine *quesitos* (items) to be arbitrated. Samba Schools are judged on each respective sections of drums, Samba Music, harmony, evolution, *enredo*, allegories, costumes, Front Commission performance, and Samba Host with Flag Bearer couple performance. There are many pages of regulations regarding the procedures of judging. There are also protocols to be followed in case there is a tie for the winner. If any part of the production ever goes wrong with the Samba School’s performances (due to electricity outages, as an example), Samba Schools have the right to petition to LIESA. They can plead their case before the scoring takes place, given that the School shows proof of the causing casualties.

The six best scored Samba Schools get to perform once again on Saturday. In 2018, these Schools performed on February 17th. This date is known as *Sábado das Campeãs* (Saturday of the Champions). The winning Schools profit-share from ticket sales of Carnival. The first-place winner profits the most, the runner-up second, and so forth. The winning performances do not come without pressure. The Samba Schools have to perform very closely to the original performances. That includes having a similar number of performers in each section and performing within a time line, just like the initial performance. If the School deviates too much from the original performance, they
are fined thousands of reais (Brazilian currency), and if the divergence is too significant, the Samba School will even have to forfeit its title.
CHAPTER 4: CONTEMPORARY DEVELOPMENTS IN THE CARNIVAL CULTURE

The Benefits of Commercialization

With all its negative effects, commercialization of Carnival comes with much positivity as well. There are many advantages that commercialization of Carnival has brought to the Brazilian economy and its citizens. It is notable to mention that even back in *entrudo* times, the manufacturing of *limões de cheiro* were an opportunity for the small capitalists, including families, widows, even freed black women to reap the benefits of commercialization of Carnival (Moraes 31). Commercially speaking, as festivities were already leading to some profit, hundreds of people temporarily survived financially thanks to Carnival (Kraay 433-434).

In the 1900s, Carnival also had some philanthropic qualities. Some higher-class performers in masks took advantage of Carnival as “Velhos” to collect money for the needy (Moraes 116 and 205). From a social point of view, these performances were so compelling that audiences donated to the “poor” not knowing that they were the higher-class performing as the oppressed.

Presently, Carnival in Rio de Janeiro is responsible for creating jobs for many Brazilian citizens. In a 2004 news article from Xinhua News Agency, it is revealed that the leader and organizer of Rio de Janeiro’s Carnival asserted that the festival would boost local economies (1). One can perceive how this statement rings true as Carnival profited two-hundred and sixty-seven million dollars that year. The article explains that the tourism was a top beneficiary bringing in eighty million dollars in earnings, but that Rio de Janeiro citizens also benefited either directly or indirectly from the total amount. The Rio de Janeiro Hotel Association declared that all hotel rooms got booked up during
Carnival time and that the estimated expenditure for each tourist was of five-hundred dollars per day. Hence, the income estimated for that sector was fifteen million dollars. It is claimed that Carnival of 2004 was responsible for creating one hundred and eight jobs, benefiting eighteen thousand Brazilians who worked for different aspects of the Carnival event, either in production or on the creative side (1). It is interesting to note that half of these jobs aided unemployed Brazilians.

Ten years later, the same news agency released another article regarding the economy boost that the city of Rio de Janeiro received as a result of its Carnival. The article claims that in 2014, Rio de Janeiro’s state governor expected Rio de Janeiro’s Carnival to generate approximately one million dollars for the city. RIOTUR claimed that nine-hundred thousand and twenty tourists were expected to enjoy Rio de Janeiro’s Carnival that year, and that seven-hundred and fifty million dollars would be generated thanks to tourism, which included the hotel and restaurant businesses as well (1). The remainder of the profits were believed to have come from other activities that were directly connected to Carnival. These activities included decorations of the actual parade as well as investments in the Samba Schools. This estimate was created from Carnival officials, basing the amounts of profits from the previous year’s Carnival. The article discloses that, in 2013, RIOTUR declared a six-hundred and sixty-five million dollars in profits arising from tourism. Based on officials’ expectations of a ten-percent increase, they arrived at the estimates of that year’s figures.

Not only is Rio de Janeiro the focal point of Carnival, but it is also the vessel of other monumental events. Julio Bueno, the Economic Development Secretary of Rio de Janeiro at that time, claimed that events such as the 2014 World Cup and 2016 Summer
Olympics may have also been contributing factors for the attraction of tourists toward the city of Rio de Janeiro, impacting the financial improvements of Carnival. As far as job generation, a shocking increase took place in 2014. On account of Carnival, two-hundred and fifty thousand jobs were created, generating employment to Brazilians throughout the entire year. As Samba Schools’ budgets reached approximately a million dollars, these Schools could afford to hire Rio de Janeiro’s citizens as workers all year long (1).

John Branch, a writer for the New York Times, points out that in 2016, during the last weeks before the Carnival performance, there is always much work to be done, and Samba Schools are in a frenzy preparing and worrying about the last-minute details. The Cidade do Samba (Samba City) is an enormous warehouse-type building that holds Samba Schools’ main visuals, such as the allegorical floats and costumes. Many workers are hired to finish the last touches of these visuals, including cutting, gluing, painting, sawing, sewing, and any other job that requires perfecting the School’s aesthetics (1). It is not unusual for each Samba School to spend millions of dollars to mount their performances. The top Samba Schools have budgets of around two and a half million dollars. This funding comes from different sources. One of the main funding contributors is the city and state of Rio de Janeiro, subsidizing about one million dollars for the more established schools. Private industries such as the media enterprise Globo and the oil company Petrobrás also contribute to Carnival’s financial support. Furthermore, according to Branch, it is known historically that some of these Schools get funds from the jogo do bicho (animal game), a gambling lottery in many neighborhoods owned by the mafia (1). I remember vividly as a teenager that while living with my parents, people would ring the doorbell, asking if we wanted to play the animal game. This soliciting
type of behavior was fairly common, and we did not think much of it. Little did we know that this underground organization was helping sponsor the Samba Schools.

A common struggle for some Samba Schools is having to give up creative control due to commercial sponsorships. As an example, in 2012 a powerful and popular dairy company by the name of Danone paid for one of the Samba Schools to perform the theme of the history of dairy in the Carnival of Rio de Janeiro. Another Samba School performed a theme on Equatorial Guinea that was funded by the African dictatorship, causing much discourse and feverous debating in Brazil (1).

Part of all of this funding, whether it comes from commercial industries, the government, or “suspect” animal games, goes toward paying the thousands of man hours to work on various aspects of each Samba School. It is estimated that each Samba School employs two-hundred employees to work on the floats and costumes alone. Some more significant Carnival crew, such as the Carnavalesco (designer), can receive a hefty annual pay check. In 2014, Branch reveals that well-respected Carnavalescos, such as Paulo Barros, earned salaries of about two-hundred and fifty thousand dollars that year (1). It is ironic to observe that while some individuals get financially compensated to work on the different properties of Carnival, the ordinary performers, or a performer who does not have celebrity or political status, does not get compensated to perform. They “get” to wear the costumes made for the performer, but most of the time these costumes belong to the Samba School; thus, they have to be returned. These Samba Schools, in turn, sometimes recycle these costumes, making alterations for the following year’s performance. This recycling happens especially if that School is struggling financially or if the government has cut their funding due to a decline in Brazil’s economy.
In 2017, it came as a surprise to the Samba Schools, according to LIESA, to find out that Rio de Janeiro’s mayor decided to cut the funding by fifty percent for each School’s production for the 2018 Carnival. Being a significant financial reduction, the Samba School members and directors as well as LIESA managers, demanded a meeting with the mayor. Carnival producers knew and understood the consequences of the mayor’s actions. His decision would affect so many aspects of Carnival, including the compromising of the overall spectacle. This budgetary cut would also affect the generation of jobs, and Samba Schools and LIESA were ready to find a solution to the problem. Samba Schools and LIESA were also distraught by the mayor’s actions because the mayor claimed that Carnival in 2018 would be an even more massive spectacle of previous years. Hence, the mayor had previously promised to financially assist these Samba Schools more than the previous year’s Carnival. This promise took place during election time. One can argue that it is not the first time a politician has withheld the truth in order to gain political power. LIESA publicized on its website about this financial crisis. It is not clear what the outcome from that meeting was, or if they even met at all. Nevertheless, Carnival in 2018 went on as planned, and the aesthetics did not seem to have been compromised by the “threat” of lack of funds.

Revisiting the issue of paying some of the crew and not the performers is also worth noting. The decision of paying workers, but not the performers, is ethically problematic. Are performers less valuable than the set builders or designers? Does the Samba School assume that performers will not demand compensation because traditionally they have not requested it? Are the performers being taken advantage of? Perhaps performers are just happy and feel honored to perform in their Samba School,
and that might be payment enough for them. Branch discloses that a Samba School’s cultural director, André Bonatti, hypothesizes that the performers do not think about their financial investment, but what they think about is the human investment. Bonatti claims that the most integral component of Carnival is the performers, and that even though they do not take salaries, they have love (1). It is not clear from the article what this “love” is, but one could guess that Bonatti means that the performers have love for Carnival (as opposed to love from the creative or production team of Carnival). This discussion goes beyond the scope of this thesis; however, it is a valuable point for argument, requiring further research and study.

According to a study done by Luiz Carlos Prestes Filho, the superintendent of the Development of Cultural Industry of Regional Government, the industry of Carnival from Rio de Janeiro generated two-hundred and fifty thousand jobs in 2018. Cited by Globo’s online news, the article also claims that businesses such as tourism, entertainment, music, audiovisual, to mention a few, were benefited the most from the profits of Carnival in Rio de Janeiro. Filho asserts that “Carnival of Rio de Janeiro is a real industry and that it shows each year” (1). The generated jobs from Carnival vary from seamstress positions to carpenters, set builders, painters; in short, any job that requires the making of allegorical floats, costumes, the set, or any other aspect that has to do with the Samba School’s enredo. Besides Samba School aesthetical matters, other businesses around Carnival also employ Rio de Janeiro citizens. The study claims that in 2018, an estimated one thousand employees worked at the restaurants and bars at Sambódromo, not to mention the eighty workers responsible for janitorial duties (1). Also, during Carnival, companies from Saara, the popular commercial center, increase their hiring by
approximately four percent. The hotel business reached an estimated eighty percent of their capacity, increasing the hiring of security and servers. Rio de Janeiro’s Secretary of Tourism forecasts that tourists visiting Brazil will have spent six-hundred and twenty million dollars during 2018’s Carnival.

The positive side of commercialization of Carnival also manifests in different ways. Commercialization does not only benefit the economy of Brazil as previously mentioned. Small businesses’ profits also highly enhance come Carnival time, as the sales of Carnival paraphernalia blast. In the early days of Carnival, the sales of masks, costumes, accessories, and even confetti helped businesses grow during Carnival (Moraes 228-233). However, sometimes these accessories were detrimental to families, giving spouses freedom to behave in inappropriate ways. Masks and secret costumes’ commerce affected performance as Carnival-goers were not recognized by anyone, thus feeling more liberated. The sales of these items increased and became more popular, and spouses took advantage of their “camouflage” to perform more wildly and not get in trouble with each other for their unacceptable behaviors (265). Moreover, when Samba Schools started becoming more and more commercialized, certain Samba School performers also profited from the phenomenon. For instance, performers from the winning Samba Schools got to reap its winning status benefits. Such performers were dancers, musicians, and singers, who after having performed in the winning Samba School, were more likely to be hired by organizations or wealthy individuals to perform in their parties or private events. Hence, these performers were even more eager to be part of the winning Samba School (Raphael 79).

Most importantly, some of these Samba Schools became so lucrative that they
were able to create organizations to help the less fortunate citizens of Rio de Janeiro. For instance, the beloved Samba School by the name of Mangueira, has created a social program whose tag line is “30 years of success and citizenship.” Mangueira’s president, Chiquinho da Mangueira, claims that this organization is responsible for the positive transformation in the lives of millions of Brazilian citizens. As reciprocity to their cherished fans, this president wanted to give back to the community by founding the Programa Social da Mangueira (Mangueira’s Social Program). This program is honored as the largest social program in the world, receiving many awards, including one from the former president of the United States Bill Clinton. This program is considered the model to combat poverty and social inequality, bringing hope and optimism to Brazilians.

Moreover, this organization helps improve the quality of many different people, including the physically and mentally disabled, seniors, and children. This program operates by training and educating citizens to become autonomous.

Another benefit of commercialization is how the Sambódromo is handled. The Sambódromo is not solely used for Carnival purposes. During Carnival’s “off-season,” the Sambódromo is often rented out for special concerts and events, contributing to the city of Rio de Janeiro’s economy. More critically, the Sambódromo transforms itself into a public school (named Estádio Professor Darcy Ribeiro), operating from April until December. This well-respected school is responsible for educating and serving around eight thousand children (Araújo 228).

Even though it has been argued that commercialization has negatively affected performance in the Carnival of Rio de Janeiro, it is just as important to reveal its positives. It is impossible to determine which cause is of more importance--the “so-
called” authentic performances of Carnival in Rio de Janeiro or social assistance to Brazilian citizens. Perhaps there is a common “Sambódromo ground” somewhere in the middle that can lead to non-compromised performances and the continued growth of these social organizations.

Carnival Performance in the Conventional Theatre Context

A shocking discovery is the connection between conventional theatre and Rio de Janeiro’s Carnival. In the 1800s, Carnival had strong ties with “standard” theatre, especially in the comedic genre (Moraes 293). Moraes declares that the first person to write a Carnival-inspired theatre piece was the actor Francisco Correia Vasques, who used to be part of Zé Pereira in 1869. Carnival comedies were also written in those times (295). In the 1800s, it was customary to put on a play first, then follow it by the Carnival performances. In 1876, Carnival Society’s Fenianos built a stage in their facility for the sole purpose of putting on comedies, starring Fenianos’ members. These plays were all linked to Carnival. In 1893, these members announced that there would be an innovation regarding the play. The announcement was that men would play female roles and vice versa (294). Though this is hardly an innovation since cross gender performance is dated back to antiquity.

In 1896, Fenianos chose to criticize the Brazilian theatre as their theme. The allegorical car presented a clown and a naked woman, with a known actor at the time screaming “I’m going to reform theatre.” Moraes argues that, although that theme was appropriate in 1896, the same criticism could have been made in 1957. That year, theatre was also debauched, and it used clownish pornography and nude female performers to attract audience members (294). It would appear that Brazilian theatre was using sex to
entice spectators instead of attracting them to experience good stories. However, the same argument can be made to criticize Carnival in Rio de Janeiro in the present time. Perhaps “clownish pornography” is a slight stretch, but by looking at the almost-naked female performers, one could debate over their role in storytelling as hitherto argued.

Eneida de Moraes claims that it is impossible to disconnect Carnival from theatre (296). Moraes is referring to comedy as a genre in particular and its bond and familiarities to Carnival. She also presents an article written by Modesto de Abreu, published in Revista do Teatro (Theatre Magazine) in 1956. The article was titled “Sbat da Velha Guarda: O Teatro e o Carnaval” (Brazilian Society for Writers of the “Old School Folks:” The Theatre and the Carnival). This article explains the links between conventional theatre and Carnival. Abreu claims that the Velha Guarda (Old School Folks) hit it big when it came to the shiny Carnival in its artistic endeavors. He refers to Carnival as a “theatrical triumph” and argues that Carnival of previous years (balls, Great Societies, earlier parades, and etc.) had a fertile reciprocity to the theatre in all senses (296). To support his evidence, he points out that Great Societies groups such as Fenianos, Tenentes, and Democráticos used well-known theatre painters and set designers to create each group’s allegorical cars and other “set” decorations. The “set” here refers to the “moving set” of Carnival, since it moves along the streets. Furthermore, Abreu explains that theatre writers wrote the themes of each group and comedic stage actors and actresses performed in Carnival (296-297). These performers would go in the allegorical cars and perform critical monologues and improvise spiritual dialogues that reflected Brazil’s social dilemmas of those times. Abreu was one of the key writers and contributors to the Carnivals of the past. He was also a key collaborator that won many
prizes for Carnival groups. Therefore, Abreu feels he can expertly conclude that theatre and Carnival had a perfect advantageous symbiotic relationship (297).

In 2018, a Samba School from São Paulo performed a traditional scene on the stage on one of their allegorical floats. In honoring the horror entertainment business, the actors performed as if they were on a film set. “Witch Hunt” was the theme for that particular allegorical car. Araújo says it best, “in contemporary times during Carnival, the city of Rio de Janeiro turns into a monumental theatre, where the streets and squares turn into a stage, and the actors and audiences are united in the festivity” (79). Araújo’s quote, once again, serves as evidence to the tenacity of Brazilians as they perform their alternate ethos during Carnival through Rio de Janeiro’s “stage” that becomes the liminal space and time of which Victor Turner theorizes about.

Melo’s article "Carnivalizing Carnival-Land in the Urban Sertões of Teatro Oficina" discusses the performative ways in which the theater company Teatro Oficina uses the carnival model of performance to depict their ritual of “de-massacre.” This ritual is politically charged, and it highlights the historical massacre of an important neighborhood site. The company’s use of floats, allegories, and carnival aesthetics are also used for storytelling regarding current issues (93-94). Teatro Oficina’s successes in effective storytelling through Carnival practices can be applicable to Rio de Janeiro’s Carnival as well. By analyzing Teatro Oficina’s processes and journey, one can learn about storytelling and performance in a Carnival paradigm. Looking at the possibilities, this is an exciting way to prove that it is plausible that great stories can be told through Carnival performances, Carnival in Rio de Janeiro being no different.
CONCLUSION

To beat or not to beat to the Samba Rhythm? A wise professor once claimed: “theatre improves humanity and re-creates the world” (Kim). In the same critical viewpoint, the necessity of utilizing Carnival to re-create the world via beautiful and powerful stories to bridge the various gaps that divide the country and help unite the globe through poignant art is of upmost importance. Brazilians are more than dedicated and committed to Carnival, perhaps obsessed with the festivities, no matter what is happening to the country or to their personal lives (Moraes 32). It is well-known that no catastrophe in Brazil will ever stop Carnival, whether it would be crises, miseries, revolutions, or epidemics (322). Brazilians are radiant and fora de si (out of their minds) during Carnival (32). Queiroz also claims the Brazilians live an alternative life during Carnival, penetrating into a different reality (22). “Set our sadness aside” is an often phrase Brazilians say about Carnival. Moraes has a perfect quote from a bloco member: “in the voice of Carnival, the population forgets everything! After all, it takes so long for Carnival to get here! The party only lasts a few days… then we have to wait one year… all for the bloco (164).

Lower-class citizens cannot spend too much for Carnival, but during Carnival days they do not worry about their salaries, miseries, or lack of comfort. As a matter of fact, Moraes also claims that since confetti was such a crucial part of Carnival, these lower-class individuals would refrain from buying meat, so that they could purchase confetti for Carnival (187). It seems that even when facing tragedy, Brazilians never interrupt their Carnival performances. Whether it would be the death of a loved celebrity
or politician, war, political turmoil, or even economic and social crises, Brazilians always find a way to resume their festivities.

Thus, Carnival is a powerful manifestation of the indomitable Brazilian alternate ethos that none of life’s disappointments, challenges, or miseries will break (Kim). Furthermore, according to Moraes, even the most oppressed of all Brazilians, even if not associated to a club or unable to afford the simplest of the Carnival “toys” such as confetti or expensive costumes, finds a way to be part of Carnival (Moraes 216-217). In 1908 a newspaper declared: “Today starts the three days when all Brazilians have the right to go crazy” (218-219). “Wild and unrestrained joy” has been many of the performers and spectators’ motto during Carnival (Queiroz 59).

However, the importance of Carnival is not limited simply to the oppressed. As the corrupt Brazilian government has made all Brazilian lives challenging, the higher-classes use Carnival as a means to escape their everyday arduous life. Bakhtin’s notion of the inversion of social classes during Carnival can also be applied to the inversion of power of the higher-class citizens against the greedy Brazilian politicians. Victor Turner’s theory of liminality echoes the spirit of Carnival in Rio de Janeiro and takes it a step further. Turner argued that the fluidity of Social Drama goes through a path of “Breach” (a break in every day, ordinary society) that can lead to “Crisis” (such as violence and other social problems). This process results in the “Redressive Process” (healing notion), and it lands in “Reintegration” (when society re-groups and goes back to their ordinary lives). Through the tribal African ritual processes analyzed by Turner, he noticed that these African performers would step outside of their social roles and perform as the Other, going through a healing process and becoming transformed at the
culmination of the ritual. Turner came to the conclusion that the more technologically advanced countries presented the same progressions as the more primitive countries in their ritual performances (291-301). Carnival in Rio de Janeiro, belonging to Turner’s scope of cultural performance genres, fits into Turner’s theoretical framework. As Brazilians of all walks of life suspend their reality while performing in Carnival, this healing process, although challenging to prove, reflects the many quotes from mentioned scholars who claim that Brazilians are happy and in high spirits during these four days of Carnival.

As far as the evolution and future of Brazilian Carnival, Moraes always has the best answer when it comes to the already discussed question of “Is Carnival dying?” Her answer is always “no, Carnival is not dying, and it will not die. The evidence of the notion of Victor Turner’s transformation is indirectly apparent as Carnival has continued on and its perseverance has been the reason why Carnival has been a healing liminal experience. Carnival changes, like life changes. Thus, Carnival has to transform itself to keep up with the world’s constant transformations” (324).

In this capitalistic world, it would be unrealistic to expect or even hope that commercialization of Carnival in Rio de Janeiro will go away, leading Samba Schools into “going back in time” and performing like the “old ways.” Capitalism is not going to disappear any time soon. Commercialization of Rio de Janeiro’s Carnival is an inevitable consequence of this global capitalism, which is inclusive of Brazil. However, there has to be a balance between commercialization and excellent performances and storytelling in the Carnival of Rio de Janeiro. If this commercialization trumps storytelling to the point that *enredos* are not being performed authentically, then the involvement of
commercialization becomes problematic. If female performers are being exploited for profit’s sake, then commercialization becomes detrimental. When lower-class performers are banned from the festival simply because they cannot afford the lavish costumes or because the judging panel will deduct points for the overcrowding and timing issues, then commercialization is faulty. If competition of the Samba Schools leads to animosity, injuries, arson, and even death due to commercialization, rules and policies of Rio de Janeiro’s Carnival need to be revised and alternatives can be presented.

As previously disclosed, Carnival in Brazil has gone through many transformations. For performance and storytelling successes, it is plausible that Carnival in Rio de Janeiro is due for some new transformations in the near future. If an argument supports that commercialization has changed the roots of Carnival in Rio de Janeiro, this fact may be true; however, since the hybridity of social classes perform in the Sambódromo in Rio de Janeiro, it is time that we accept that one of the transformations has already occurred. Rio de Janeiro’s Carnival no longer belongs to lower-class citizens, but it involves all citizens, regardless of class, intellectual abilities, religion, gender, or sexual preferences. In fact, the middle and upper classes will certainly claim that they have as much right to perform in the Carnival as any other person. Are middle and upper-class individuals less qualified or less valuable to tell their own stories? Do they not have the right to have as much fun and “happiness through their alternate ethos for a few of the Carnival days” as it has been previously quoted? Just because the higher-class citizens might be more financially secure does not mean they do not have life struggles. If Carnival were to exclude these higher-class individuals from performing, wouldn’t it be considered discrimination as well? It is understandable that, like in the medieval days, as
Bakhtin explained, the slaves got a chance to be bosses during Carnival, while their owners became the targets of insults. In Brazilian society, however, most politicians are dirty, and consequently people suffer, no matter what social class they belong to. Thus, it also makes sense that the higher-classes want to have a voice as well. It would be fair to argue that these higher-class individuals want to perform their “evils away,” cleaning their souls with positivity. These citizens want to purge themselves from big government as Bakhtin proposed, no differently than the lower-classes did in the Medieval times.

Luis Valdez, in his definition of what it means to be Chicano, wrote:

To be CHICANO is not (NOT)
to hate the gabacho (pejorative for French people) or the gachupin (Spanish immigrants) or even the pobre vendido…(elite Mexicans)

To be CHICANO is to love yourself
your culture, your
skin, your language
And once you become CHICANO
that way
you begin to love other people
otras razas del mundo (other races of the world)
los vietnamitas (the Vietnamese)
los argentinos (the Argentines)
los colombianos (the Colombians)
and, yes, even los europeos (the Europeans)
because they need us more
than we need them (Valdez 175).

If one substitutes “Chicano” with “lower-class Brazilians,” then this quote will contextualize some of the feelings that the lower-class might have toward elite participation in Carnival. By not denigrating or vilifying the elite during Carnival and further embracing their participation, the overall Carnival performance will seem more coherent and this notion will reflect on this already transformed Carnival. Telling stories that affect all social classes through poignant performances ensures the Samba School’s enredo’s authenticity and successes even if that means making compromises as an ensemble and “fighting” for a review of rules and policies that are stipulated from the festival authorities.

Most oppressed citizens are not “against” the higher society Carnival participants anymore – it is now a different dynamic, one that reflects the oppressed citizens and high-society united against the greedy corrupted politicians. A great illustration of this social class union is the creation of the enredo of the Carnival in Rio de Janeiro’s 2018 winning Samba School Beija-Flor that has been briefly mentioned. I must admit that Beija-Flor’s performance was so powerful and poignant that it gave me chills and made my eyes misty. Beija-Flor’s theme spoke of inequalities of the social classes, violence, corruption, and intolerance of race, religion, and even of sport that has turned Brazil into a monster. The performances were strong and even though the theme was serious, they still inspired hope in the hearts of Brazilian citizens:

Sou eu...

Espelho da lendária criatura

Um monstro...
Carente de amor e de ternura
O alvo na mira do desprezo e da segregação
Do pai que renegou a criação
Refêm da intolerância dessa gente
Retalhos do meu próprio Criador
Julgado pela força da ambição
Sigo carregando a minha cruz
À procura de uma luz, a salvação

Estenda a mão meu senhor
Pois não entendo tua fé
Se ofereces com amor
Me alimento de axé
Me chamas tanto de irmão
E me abandonas ao léu
Troca um pedaço de pão
Por um pedaço de céu
Ganância veste terno e gravata
Onde a esperança sucumbiu
Vejo a liberdade aprisionada
Teu livro eu não sei ler, Brasil!
Mas o samba faz essa dor dentro do peito ir embora
Feito um arrastão de alegria e emoção o pranto rola
Meu canto é resistência
No ecoar de um tambor
Vem ver brilhar
Mais um menino que você abandonou

Oh! Pátria amada, por onde andarás?
Seus filhos já não aguentam mais!
Você que não soube cuidar
Você que negou o amor
Vem aprender na Beija-Flor! (LIESA)

The translation of this song is as follows:

It is me...

Mirror of the legendary creature
A monster...

Deprived of love and tenderness

The target in the aim of contempt and segregation
Of the father who rejected the creation
Hostage of the intolerance of these people

Shreds of my own Creator

Judged by the driving forces of ambition

I proceed carrying my cross

In order to find a light, a salvation
Extend the hand my Lord
Because I do not understand your faith
If you offer with love
I feed on axé [style of Brazilian soul music whose roots come from religious practices]
You call me brother so much
And you abandon me adrift
Exchange a piece of bread
For a piece of heaven
Greed wears a suit and tie
Where hope succumbed
I see liberty imprisoned
Your book I do not know how to read, Brazil!
But the samba makes this chest pain go away
Passing by with joy until becoming emotional
My singing is resistance
In the echoing of a tambourine
Come see shine
One more boy whom you abandoned

Oh! Beloved homeland, where have you gone?
Your children cannot bear it anymore!
You were the one who did not know how to care
You were the one who denied the love
Come learn at Beija-Flor! [“Hummingbird” Samba School]

I would like to culminate with some of my favorite scholarly references of Carnival. Real says that “Carnival shakes the whole nation.” It is a Brazilian obsession. “Put Mardi Gras, Super Bowl, New Year’s Eve, Halloween, and Fourth of July – all combined do not come close to the awesome celebration of Brazilian Carnival” (203). Last, Cunha famously asserts: “Carnival formed the essence of the Brazilian blood, its National soul” (14 and 15).


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