

RELEASE IN PART B6

From: Sullivan, Jacob J <SullivanJJ@state.gov>
Sent: Tuesday, January 22, 2013 7:12 PM
To: H
Subject: FW: Exit Polls

FYI. Calling in a few.

From: Hale, David M
Sent: Tuesday, January 22, 2013 3:41 PM
To: Sullivan, Jacob J; Escrogima, Ana A; Blair, Oni K; McKernan, Aud-Frances
Cc: Jones, Beth E; Dibble, Elizabeth L; Miller, James N
Subject: Exit Polls

I'm no expert on Israeli politics, but the exit polls are interesting.

As Dan noted in an email to some, the big news is a poorer than expected (but still leading) showing for Bibi, a surprise surge for Lapid, Bennett not so hot after all, and Kadima has fallen off the map. Tzipi's new party is polling 7 seats.

Emerging bottom line: Bibi could do a 61 seat right/right coalition if he can work with Bennett and Shas. Razor thin but fewer parties to juggle and more ideologically cohesive. Or he could go up to 69 in a limited center-right coalition (with the traditional religious parties but not Bennett, and only Lapid from the center.)

So, while the comparatively poor showing for Bibi's coalition looks to be a sign of weakness, the basic coalition options are still the same as expected but a firmer center partner in Lapid *IF* that's what he's looking for. Remember he has always *said*, anyway, he favors the broadest possible government.

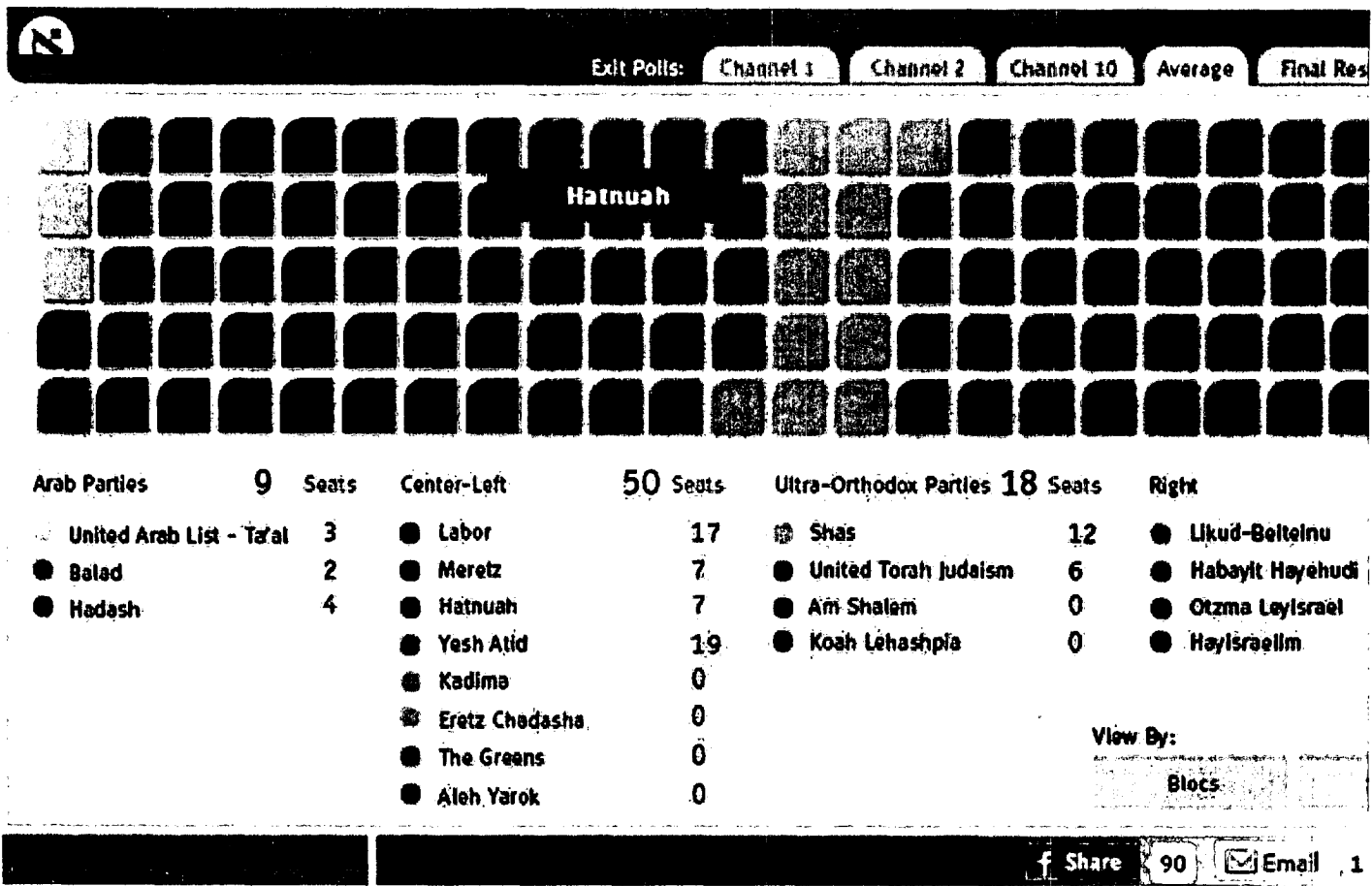
And, if the center had formed an electoral coalition –and polled the same results they did separately – they would have outperformed Likud/Beiteinu and at least in theory have had the right to try to form a government. Remember that, when you hear laments that the Israeli public is forever more stuck in the right lane. (But then of course also remember that today's center looks reactionary compared to the center of 20-30 years ago.)

And finally, remember the budget issues – a problem with Shas among others – will loom large in coalition calculations.

David

From: Kreutner, Kevin
Sent: Tuesday, January 22, 2013 3:26 PM
To: Hale, David M; Jones, Beth E; Dibble, Elizabeth L; NEA-IPA-DL
Subject: RE: Likud down, Lapid rises

Here it is in a color chart from Haaretz:



-----Original Message-----

From: Hale, David M
 Sent: Tuesday, January 22, 2013 3:17 PM
 To: Jones, Beth E; Dibble, Elizabeth L; NEA-IPA-DL
 Subject: FW: Likud down, Lapid rises

-----Original Message-----

From: Shapiro, Daniel B (Tel Aviv)
 Sent: Tuesday, January 22, 2013 3:15 PM
 To: Burns, William J; Sherman, Wendy R; Sullivan, Jacob J; Nides, Thomas R; Jones, Beth E; Prem G. Kumar;
 Jason A. Abell [redacted] dmcDonough [redacted] Benjamin J. Rhodes [redacted]; tdonilon [redacted]
 svinograd [redacted] nquilliar [redacted] Hale, David M
 Cc: Goldberger, Thomas H
 Subject: Likud down, Lapid rises

First exit polls show Likud Beiteinu below expectations, and Yair Lapid the big winner among the center/left:

- Likud Beiteinu: 31
- Lapid: 19
- Labor: 17
- Jewish Home: 12
- Shas: 12
- Meretz: 7
- Torah Judaism: 6
- Arab parties: 9

Big disappointment for Netanyahu. There will be shifts as the evening wears on, but this is the basic picture. Small chance the center/left could try to recruit Shas to join a center/left government with Lapid as PM, perhaps in rotation with Yachimovich. Much larger chance that Netanyahu will be PM, with Lapid as a major partner. But the coalition negotiations will be long and tortuous, and

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the resulting coalition inherently unstable.

Not clear there should be a congratulations call tomorrow. I'll advise further as the evening wears on.

Stay tuned.....

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