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P 211820Z DEC 89
 FM AMEMBASSY BRASILIA
 TO SECSTATE WASHDC PRIORITY 9315
 INFO AMCONSUL RIO DE JANEIRO
 DEPTTREAS WASHDC
 AMCONSUL SAO PAULO
 USCINCSO QUARRY HTS PM
 USAFSO HOWARD AFB PN//001
 USCINCLANT NORFOLK VA
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C O N F I D E N T I A L SECTION 01 OF 04 BRASILIA 14803

DEPT PASS FEDERAL RESERVE FOR ROBITAILLE

E.O.12356: DECL: OADR
 TAGS: PGOV, BR
 SUBJECT: BRAZILIAN ELECTION: SECOND ROUND WINNERS
 AND LOSERS

1. C - ENTIRE TEXT.

 SUMMARY

2. THE ELECTION OF FERNANDO COLLOR DE MELLO IS A
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VICTORY ABOVE ALL FOR BRAZIL'S NEW DEMOCRATIC
 INSTITUTIONS, AND, IF COLLOR'S RHETORIC IS
 SINCERE, OF PRIVATIZATION AND MARKET-ORIENTED
 ECONOMIC IDEAS OVER STATE EXPANSIONISM IN THE

UNITED STATES DEPARTMENT OF STATE
 REVIEW AUTHORITY: NORMAN M BOUTON
 CLASSIFICATION: UNCLASSIFIED
 DATE/CASE ID: 16 MAR 2009 200503114

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ECONOMY. ALSO IN THE WINNERS' CIRCLE ARE: SMALL PARTIES AND POLITICIANS WHO WORKED FOR COLLOR AND WERE ABLE TO DELIVER VOTES; GLOBO NETWORK, POLLSTERS; AND THE GENERAL CONFEDERATION OF LABOR (CGT).

LULA IS ALSO A WINNER; HIS GALLANT, UPBEAT CAMPAIGN LEAVES HIM, AT AGE 44, THE PRINCIPAL LEADER OF THE "OPPOSITION." IN THE LOSERS' COLUMN ARE: THE LARGE PARTIES AND THEIR LEADERS, LEONEL BRIZOLA, MARIO COVAS, THE SOLE WORKERS CENTRAL (CUT), CIVIL SERVANTS, AND ABOVE ALL, INCUMBENT PRESIDENT JOSE SARNEY. DEPENDING UPON HOW COLLOR CARRIES OUT HIS ECONOMIC REFORMS, SOME BUSINESS INTERESTS WILL WIN, OTHERS WILL LOSE. END SUMMARY.

COLLOR AND LULA

3. FERNANDO COLLOR DE MELLO HIMSELF, AT AGE FORTY, WILL ENTER ON THE WORLD'S STAGE AS THE WONDER BOY WHO CAME OUT OF NOWHERE TO WIN BRAZIL'S FIRST FREE, DIRECT PRESIDENTIAL ELECTION IN 29 YEARS.

4. WHILE A DEFEATED COLLOR COULD WELL HAVE FADED INTO HISTORY, LULA IS A WINNER EVEN AS A LOSER. HIS "WORKERS PARTY" (PT) SPEARHEADED A SPIRITED
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CAMPAIGN THAT CAME CLOSE TO ACTUALLY DEFEATING COLLOR. THE PT'S CAMPAIGNING STYLE ALMOST ERASED COLLOR'S 15 POINT LEAD IN THE SECOND ROUND WITH THE SAME DYNAMISM THAT THRUST LULA PAST PDT CANDIDATE LEONEL BRIZOLA IN THE CLOSING WEEKS OF THE FIRST ROUND.

5. LULA'S SUPPORT GREW AMONG THE MOST POLITICIZED SECTORS AND REGIONS OF BRAZILIAN SOCIETY. HIS SUPPORT, WITHIN HIS OWN PARTY, AND AMONG HIS SECOND ROUND ALLIES, SHOULD HOLD FIRM--ESPECIALLY IF COLLOR ENACTS AN AUSTERITY PROGRAM THAT INDUCES HARDSHIPS IN 1990. LULA, AT 44, HAS MADE HIS MARK. HE HAS EMERGED AS BRAZIL'S LEADING OPPOSITION FIGURE, ALTHOUGH ONLY HIS FUTURE

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PERFORMANCE IN CONGRESS WILL DETERMINE WHETHER HE
RETAINS THAT DISTINCTION.

LABOR WINNERS AND LOSERS

6. CGT PRESIDENT ANTONIO ROGERIO MAGRI, WHO MADE
A SHOW OF PERSONALLY SUPPORTING COLLOR AND THEN
DRAGGED THE CGT EXECUTIVE ALONG WITH HIM, NOW HAS
A DIRECT LINE TO THE PRESIDENT-ELECT, AND A SAY IN
THE CHOICE OF THE NEXT LABOR MINISTER.

--CGT'S RIVAL, THE CUT, JOINS ITS POLITICAL ALLY,
THE PT, IN OPPOSITION TO COLLOR, AND WILL QUICKLY
CRY FOUL IF CUT AFFILIATED UNION WORKERS SUFFER
SALARY LOSSES IN A COLLOR ECONOMIC REFORM PLAN.
CUT, WHICH IS CONSIDERABLY LARGER THAN THE CGT,
PREDOMINATES IN THE PUBLIC AND PARASTATAL SECTORS,

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C O N F I D E N T I A L SECTION 02 OF 04 BRASILIA 14803

DEPT PASS FEDERAL RESERVE FOR ROBITAILLE

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AND WILL BE HARD HIT SHOULD COLLOR FOLLOW THROUGH
ON HIS PLEDGES TO PRIVATIZE AND DIMINISH THE SIZE
OF THE FEDERAL BUREAUCRACY.

PARTIES AND POLITICIANS

7. POLITICIANS THAT JUMPED ONTO AND STAYED ON THE
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COLLOR BANDWAGON GENERALLY ARE WINNERS. RENAN
CALHEIROS, SENATORS ALBANO FRANCO (SERGIPE) AND
JOAO CASTELO (MARANHAO), FOR EXAMPLE, WERE EARLY
AND STEADY SUPPORTERS OF COLLOR WHO APPEAR TO HAVE
DELIVERED VOTES IN THEIR STATES.

--OTHER SUPPORTERS, DESPITE THEIR LOYALTY AND
PERSISTENCE, SAW THEIR HOME CONSTITUENCIES
OVERWHELMED BY LULA. IN THIS CATEGORY ARE MARCIA
KUBITSCHK (FEDERAL DISTRICT, WHERE SHE HOPES TO
RUN FOR GOVERNOR), RUNNING MATE ITAMAR FRANCO
(####) POLITICIANS WHO JUMPED ON AND OFF BANDWAGONS
AND ENDED UP ON A LOSING WAGON--AND IN MOST CASES
TWO CONSECUTIVE LOSING WAGONS--ARE BOTH DEFEATED
AND DISCREDITED.

--IN THIS CATEGORY ARE PMDB LEFTISTS SUCH AS
WALDIR PIRES AND MIGUEL ARRAES, AND CONSERVATIVE
PMDB GOVERNOR GERALDO DE MELO (WHO VACILLATED

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BETWEEN COVAS, COLLOR AND ULYSSES IN THE FIRST ROUND, WAS WITH COLLOR UNTIL DECEMBER 15, THEN JUMPED TO LULA), THE PFL CONGRESSMEN WHO TRIED TO DRAFT TV PERSONALITY SILVIO SANTOS, AND OTHERS WITH LITTLE OR NO IDEOLOGICAL CONVICTIONS WHO SOUGHT TO JOIN THE WINNING TEAM AND SIMPLY GUESSED WRONG.

9. THE TWO BIG PARTIES, THE PMDB AND PFL, CONTINUE TO FRAGMENT, WITH THE LARGER FRAGMENTS LIKELY TO SURVIVE, BASED ON STATE-LEVEL POWER BROKERS, LIKE ORESTES QUERCIA (SAO PAULO) AND ALVARO DIAS (PARANA), WHO STAYED NEUTRAL IN ROUND TWO. THE PMDB SPLIT NASTILY OVER SUPPORT FOR LULA

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IN THE SECOND ROUND, ON THE HEELS OF ULYSSES GUIMARAES' EMBARRASSING FOUR PERCENT IN THE FIRST ROUND BALLOTING. THE PMDB LEFT WILL PROBABLY MOVE TO JOIN COVAS' PSDB, BRIZOLA'S PDT AND LULA'S PT IN OPPOSITION TO COLLOR. PMDB "MODERATES" WILL PROBABLY ATTACH THEMSELVES TO COLLOR'S GOVERNING COALITION.

--THE PFL AS A PARTY SUFFERED THE DUAL DISGRACE OF AURELIANO CHAVES' ONE PERCENT ON NOVEMBER 15 AND THE SILVIO SANTOS EPISODE. HOWEVER, BECAUSE PFL MEMBERS TEND TO ALLY IDEOLOGICALLY WITH COLLOR AND INSTINCTIVELY WITH VICTORY, MANY OF THEM NOW HAVE A NEW LEASE ON LIFE.

10. SMALLER PARTIES, SUCH AS THE PT, THE PSDB AND THE PDT, WHICH WERE ABLE TO ORGANIZE AROUND A SET OF PRINCIPLES OR A REGIONAL BASE, EMERGE FROM THE ELECTION WITH THEIR IDENTITY AND SUPPORT BASES RELATIVELY INTACT.

11. PRESIDENTIAL CANDIDATES MARIO COVAS AND LEONEL BRIZOLA, HOWEVER, BELONG MORE IN THE LOSERS' COLUMN. COVAS' LATE AND HALF-HEARTED SUPPORT OF LULA DID NOT PRODUCE MANY VOTES FOR LULA IN SAO PAULO (WHERE COLLOR WON BY A MARGIN OF ROUGHLY 15 PERCENT), EVEN IN SANTOS, COVAS' HOME

NOTE: (####)OMISSION IN PARAGRAPH 7. CORRECTION TO FOLLOW.

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SUBJECT: BRAZILIAN ELECTION: SECOND ROUND WINNERS TOWN. COVAS, SHOULD HE RUN FOR GOVERNOR NEXT YEAR, COULD FACE STIFF COMPETITION FROM THE LEFT (LULA), THE RIGHT (MALUF AND/OR AFIF), AND EVEN THE CENTER (WHOMEVER INCUMBENT GOV. QUERCIA TAPS). BRIZOLA PRODUCED VOTES FOR LULA IN RIO GRANDE DO SUL AND RIO DE JANEIRO, AND MAY BE INCREASINGLY ECLIPSED BY LULA.

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THE MEDIA

12. LULA AND HIS ALLIES HAVE CHARGED GLOBO NETWORK WITH HAVING SUPPORTED COLLOR (INCLUDING THE NEW ACCUSATION THAT IT SELECTED SEGMENTS OF THE DECEMBER 14 DEBATE UNFAVORABLE TO LULA FOR USE ON THE DECEMBER 15 NIGHTLY TV NEWS). HOWEVER, ITS CONTINUED UNENCUMBERED SURVIVAL IS GUARANTEED BY COLLOR'S VICTORY. COLLOR, UNLIKE LULA (OR BRIZOLA), HAS NO MANDATE TO BREAK UP MEDIA MONOPOLIES--ESPECIALLY GIVEN THAT HIS FAMILY IS PART OF ONE IN ALAGOAS.

13. POLLSTERS ARE CLEAR WINNERS OF THIS ELECTORAL CAMPAIGN. IBOPE, THE COUNTRY'S OLDEST POLLING ORGANIZATION HAD THE BEST TRACK RECORD IN BOTH THE FIRST AND SECOND ROUNDS; DATAFOLHA, GALLUP AND VOX POPULI ALL TURNED IN RESPECTABLE PERFORMANCES AS WELL. EVEN BRIZOLA, WHO SPENT MUCH OF THE FIRST ROUND ACCUSING POLLING ORGANIZATIONS OF CONSPIRING TO 1) CREATE COLLOR AND 2) RUIN BRIZOLA, NOW CREDITS THEM WITH CALLING THE SECOND ROUND CAMPAIGN FAIRLY AND ACCURATELY. IBOPE, DATAFOLHA AND VOX POPULI EACH PREDICTED THE OUTCOME OF THE ELECTION CORRECTLY WITH ITS EXIT POLL.

14. FREEDOM OF THE PRESS ALSO "WON." IN ADDITION TO LIVELY AND AGGRESSIVE REPORTING CHARACTERIZING THE ENTIRE CAMPAIGN, THE PRESS WITHSTOOD TWO SIGNIFICANT CHALLENGES TO ITS FREEDOM: ATTEMPTS TO LIMIT ITS FREEDOM TO 1) PUBLISH POLLING RESULTS IN THE LAST 30 DAYS OF THE CAMPAIGN AND 2) CONDUCT
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PARALLEL, UNOFFICIAL VOTE COUNTS AFTER THE POLLS CLOSED.

DEMOCRATIC INSTITUTIONS

15. IN ADDITION TO EXERCISING ITS FREEDOM OF THE PRESS, BRAZIL CONSOLIDATED ITS TRANSITION TO DEMOCRACY WITH THIS ELECTION CAMPAIGN. PRESIDENT SARNEY IS PREPARING TO HAND OVER POWER PEACEFULLY (IF NOT HAPPILY) TO THE PRESIDENT-ELECT. VOTERS WERE ENTHUSIASTIC THROUGHOUT THE CAMPAIGN, IF ONLY FOR THE PROCESS ITSELF. THOSE WHO WERE ACTIVELY INVOLVED IN THE CAMPAIGN SHOWED AN ALMOST RELIGIOUS FERVOR FOR THEIR CANDIDATES--CULMINATING IN MEGA-RALLIES IN BIG CITIES AND LULA'S POPULAR FRONT LEGIONS ALMOST TAKING OVER THE STREETS WITH THEIR FLAG-WAVING AND HORN-HONKING ELECTION EVE FLEET.

16. NOTWITHSTANDING SOME ELECTION LAW AMBIGUITIES--EXPOSED BY THE SILVIO SANTOS AFFAIR AND STILL AS YET UNREPAIRED BY PERMANENT LEGISLATION--THE RULES WERE FAIRLY ENFORCED BY THE ELECTORAL JUDICIARY. COLLOR'S VICTORY IS UNSULLIED BY ANY SERIOUS ACCUSATIONS OF FRAUD. THUS, HE WILL ASSUME OFFICE WITH A LARGER POPULAR MANDATE THAN ANY OF HIS PREDECESSORS.

BUSINESS INTERESTS

17. COLLOR HAS PROMISED TO OPEN UP THE ECONOMY,

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DEPT PASS FEDERAL RESERVE FOR ROBITAILLE

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 CUT INFLATION AND FORCE BRAZILIAN FIRMS TO BECOME
 MORE COMPETITIVE IN THE WORLD MARKET. IT WILL NOT
 BE CLEAR WHICH BUSINESS INTERESTS WILL BENEFIT AND
 WHICH WILL SUFFER UNTIL HE REVEALS SPECIFICS OF
 HIS PROGRAM. SHOULD COLLOR CARRY OUT HIS PROMISE
 TO END THE INFORMATICS MARKET RESERVE, FOR
 EXAMPLE, BRAZILIAN CONSUMERS, UNIVERSITIES AND
 TECHNICIANS IN THE AGGREGATE WILL BE THE BIG
 WINNERS (ALONG WITH US AND OTHER FOREIGN
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EXPORTERS); PROTECTED AND INEFFICIENT BRAZILIAN
 COMPUTER MANUFACTURERS, THE SPECIAL SECRETARIAT
 FOR INFORMATICS (SEI) BUREAUCRACY, AND SMUGGLERS
 WILL BE THE LOSERS.

SARNEY

18. SARNEY IS A BIG LOSER. WANTING TO GO DOWN IN

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HISTORY AS THE CUSTODIAN OF BRAZIL'S DEMOCRATIC TRANSITION (ONE OF THE FEW PALPABLE ACHIEVEMENTS OF HIS TERM OF OFFICE, ESPECIALLY GIVEN THE COUNTRY'S BLEAK ECONOMIC PICTURE), HE MAY HAVE LOST THAT HONOR BY HAVING MEDDLED IN THE SILVIO SANTOS AFFAIR. NO CANDIDATE WANTED SARNEY'S ENDORSEMENT IN EITHER ROUND (MALUF CALLED IT THE "KISS OF DEATH" TO ANY CANDIDACY), AND BOTH LULA AND COLLOR TRIED TO PIN SARNEY ON EACH OTHER TO BE ABLE TO LAY CLAIM TO THE TITLE OF "MOST AUTHENTIC OPPOSITION FIGURE."

19. BECAUSE OF COLLOR'S NASTY ANTI-SARNEY CAMPAIGNING IN BOTH ROUNDS AND THE LINE-UP OF COMPETING FORCES IN SARNEY'S MARANHAO STATE, THE SARNEY FAMILY REPORTEDLY ENDED UP VOTING FOR LULA. A VICTORIOUS COLLOR NOW STANDS POISED TO REMAKE THE POLITICAL MAP IN MARANHAO, HOPING IN THE PROCESS TO WIPE THE SARNEY CLAN OFF OF IT. SHOULD COLLOR CARRY OUT HIS PRINCIPAL CAMPAIGN PLEDGE, I.E. ATTACK SARNEY REGIME CORRUPTION, WE COULD SEE A COLLOR MINISTRY OF JUSTICE OPENING UP INQUESTS AIMED AT PROSECUTING THE FORMER PRESIDENT

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AND HIS ASSOCIATES. ON DECEMBER 20 COLLOR'S SPOKESMEN ALREADY WERE ANNOUNCING "OPERACAO PEGA-LADRAO" (OPERATION CATCH-A-THIEF).

CONCLUSION

20. BECAUSE OF THE SUCCESS OF SOME INDIVIDUAL PERSONALITIES AND PARTIES ON THE LOSING SIDE, COLLOR AND HIS ALLIES ARE NOT THE ONLY WINNERS OF THIS ELECTION. WE THINK THAT THE BRAZILIAN PEOPLE AND THE UNITED STATES ARE WINNERS TOO, BUT COLLOR NOW HAS THE POWER TO DISAPPOINT, AND IT REMAINS TO BE SEEN WHETHER HE IS UP TO THE TASK OF LEADING SUCH A COMPLEX AND TROUBLED NATION.

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