

[Transcript] The Ezra Klein Show / What's Really Going On in Russia?

From New York Times Opinion, this is the Ezra Klein Show.

Before we begin, we are doing another Ask Me Anything episode, our quarterly AMA.

This will be the last one before I go on book leave for a bit, so if you've got anything you want to hear me answer on the show, anything at all, send it into Ezra Klein Show at nytimes.com

with the subject line AMA.

But to today's show, and to just the world, what the hell happened in Russia last weekend?

All of a sudden, we had Russian mercenaries from the Wagner Group marching not on Ukraine, but on Russia.

They took control of the city, they shot down helicopters, and they advanced about 125 miles outside Moscow. They were led by Evgeny Pergoshin, who swore, no, no, no, this was not an attempted

coup of Putin. It was just an effort to topple the corrupt and ineffective military leadership Putin appointed and relies on and surrounds himself with. Then unexpectedly, a ceasefire was negotiated by Belarusian President Alexander Lukashenko. Somehow, in that deal, there were no criminal charges, no criminal charges at all for Pergoshin, and he got a secure exile, at least in theory. I mean, that was something new. You can march on Russia, and Putin will let you out not only alive, but without even facing charges. So what was this? Was it a mutiny? A coup attempt? What does it mean for Vladimir Putin and the solidity of his regime? What does it mean for Ukraine? And I should say here, there is just a lot we still don't know. A lot we are still learning.

The situation is changing, and you'll hear it in this conversation, even as we went to tape.

But to have, I think, any chance of seeing through the fog here, you need a sense of how authoritarian regimes work, and particularly how they work in Russia. And that's why I wanted Stephen Kotkin to come on the show. Kotkin is a leading scholar of Russian history at Stanford. He's best known for his multi-volume biography of Stalin, but he's very connected in the region, and has been a crucial interpreter of Putin's regime, too. As always, my email for guest suggestions, thoughts, and AMA questions, as reclined show at nytimes.com.

Stephen Kotkin, welcome to the show. Thank you for the honor of the invitation.

I want to take people through a little bit of the background here. So what is the Wagner group, and what has their role in Putin's regime in the war on Ukraine been?

So the Wagner group is a private business. It's a private business that does state business in Russia. Everything in Russia is state private overlap. It doesn't matter which side it initiates from.

And so they have vast interests, African gold mines, many other very lucrative businesses in Africa, as well as at home in Russia. And in order to guarantee the cash flow of their business, the security of their business, they created a security arm. That security arm then grew into a business on its own. So what was originally a means to an end became yet another business, an end in itself. That business, we don't know quite what the revenues have been,

but they've been very substantial and enriched the people involved. In addition, it had connections to Russian military intelligence, so that Russian military intelligence, the so-called GRU could use these guys, but with implausible deniability while they use them.

So there's this guy, Utkin. No one's ever heard of him. Utkin is the guy who's known to gear or call signal is Wagner. And the reason he chose Wagner is because he's a quasi-fascist. And Wagner was, of course, the beloved composer of Hitler and many others in the Nazi regime.

So you have a kind of private business making a lot of money, which also does dirty work with this

[Transcript] The Ezra Klein Show / What's Really Going On in Russia?

implausible deniability for Russian military intelligence, Syria, Mali, Central African Republic, all the way in an arc towards Dubai. Dubai is the sort of center of the Russian illicit economy. And so there's this fantastic personality named Yevgeny Prugoshin. And Prugoshin starts out

with a cafe. And before you blink, he's catering Kremlin events for Vladimir Putin. And more than that, he's doing the meals for the defense ministry. Some of those no-bid government contracts where

not only is the price inflated, but the skimming is almost unlimited. And so he rises as a result of this opportunism. And he's got all of these businesses, plus the militia or the death squads, however you want to call them. And plus he's attached to the regime in these non-transparent, typical ways for Russia. But they're going to take his businesses away.

He's now going to be subordinated to his enemies inside the Russian Ministry of Defense. And they're going to expropriate him. They're going to take every one of his businesses and cut him down. And so he decides to move against that Minister of Defense, Sergei Shoigu, and that Chief of Staff, Valery Grasimov, before they take him down. The other piece that you need to know is that this guy is just really good at social media. He has an artistic side, a creative side. He plays a thug. He plays a thug who is tougher than any other thug, but who also is out for the little guy and against the elites.

That is to say, he's got that full populism streak. And so he's very successful in the social media sphere in creating impressions about who he is and what he can get done and how powerful he is. And he's telling truth about the corruption and incompetence of the Ministry of Defense, about the failures of the war in Ukraine, about the motives, the corrupt motives over the war in Ukraine. So he's this liar who's doing truth-telling with this tremendous social media following on telegram channels in Russia, who has what I think is probably more than a billion-dollar business at stake.

And lo and behold, before they can take him down, he tries to move against them.

So during this period, before his actual move comes, he is, as you know, on social media, on telegram, which is a major platform in Russia for people who aren't familiar with it.

And as you say, is making these searing criticisms, not of Putin, but of the rest of the defense leadership. He is, in a sense, truth-telling and in another sense, protecting his interests. But you know, he's out there with a lot of followers, with a real imprimatur to his own name, attacking the conduct of the war that ultimately resolves down to Putin's decision-making.

And one question that those of us who are unfamiliar with the dynamics here have is that in this world of highly censored media, it seems that on the other hand, Putin is allowing Prugoshin and also many of these more right-wing nationalist war bloggers to take a very critical line on the conduct of Russia's invasion of Ukraine and on the competence of the people Putin has appointed to run it. So why, through these months, long months, when Prugoshin is making these attacks, why is Putin permitting it?

That's a great question. Could he fully have controlled it?

That's an open question for me. Could he have controlled it better? Yes, there's no doubt.

But here's the thing. You know, in the animal kingdom, just about every animal has a predator. In other words, every animal is looking over its shoulder or is racing away to try to escape dangerous situations because that's just how nature is, red and tooth and claw.

Well, authoritarian regimes are like this too. Each powerful individual has an enemy or a predator.

[Transcript] The Ezra Klein Show / What's Really Going On in Russia?

Most of those enemies are natural because they're competing for the same resources or the same prestige or the ear of the leader. Some of that is, in fact, deliberately instigated by the leader. The leader will give overlapping jurisdictions. The leader will give the same assignment to multiple groups. The leader will set up or exacerbate the conflict. Why would a leader do that? The same reason a leader appoints less than competent people to positions of power. Because if they're good, they become a threat to the regime itself. If they're not so clever but loyal, then you see them getting promoted to positions of power. This gives you an inherent inefficiency, a low quality performance for authoritarian regimes because they have what we call negative selection, promotion of people precisely because they're not the most talented. And it also means there's endemic conflict, usually underneath the carpet, not easy to see, occasionally becomes visible. But in this case, in the social media environment that Russia is in today, like the whole world, it was well above the carpet for a long time. But the idea must have been or could have been, or let's speculate that it might have been, that this is under control because the natural enemies will balance each other and they're all dependent on the leader, the single leader for protection. And so they won't cross the line or if they do cross the line, their predators will take them down. And so there's a way in which this is supposed to be partially automatic. And so there can be some complacency in addition to a lack of understanding of social media on the part of Putin because he himself doesn't use it, he doesn't participate. He's not on the internet as far as we know. But in addition to that, there's some complacency that sets in. And then of course, finally, authoritarian regimes degrade over time. They just get fat and happy worse and worse, more and more corrupt, and they corrode themselves. And so all of those processes that are at work, it's still nonetheless was a surprise that it got this far. So when he is making his arguments about how the Wagner group has been mistreated, Progosian is saying, one, of course, that the war is being run in a corrupt and incompetent way, but he says that the Wagner group is being starved of ammunition. He then says there was an airstrike conducted against them, an airstrike against Russian mercenaries by the Russian military. And then on June 10th, the state military announces that all fighters will have to sign contracts directly with the Ministry of Defense. So they can't be this independent force anymore. They actually have to sign up. How much of this was, in your sense of it, truly Progosian losing a series of fights? How much of it was, I mean, it's hard to know what to make of the airstrike allegation. I have no idea if it's true. But initially, the theory was maybe this is a coup. And then quickly, the theory in the West begins to become this guy was hanging on for your life. And finally, attempts this very high risk gamble to just try to survive. Which theory do you subscribe to at this point? Yes, so it's both. That's how these regimes work. Offense is the best defense. You have to be on the front foot against your enemies before they get to you. So he's conducting an offensive on the front lines against Ukrainian forces. And he's conducting an offensive behind his back on the home front against his other enemies, which are, as I said, the Ministry of Defense and the Chief of Staff. And so he is not necessarily under siege the way that he described it. I think we have to be careful taking at face value, like you said, the idea that he was being bombed. But nonetheless, they're clearly trying to undermine him and his work at every turn. And you can see state media take credit for some of the Wagner quasi achievements on the battlefield in that hellhole that everybody now knows about Bachmoud.

[Transcript] The Ezra Klein Show / What's Really Going On in Russia?

And so you can be angry about that. You know, you do the hard work. Your guys are the ones who die. And then somebody back in a comfortable office gets the credit for it or the medal for it, as it were, in the state media. And so there's just roiling anger, resentment, fury back and forth, because Progosian is talking about the incompetence and corruption of the Minister of Defense and the Chief of Staff. These are the guys who have the other nuclear football besides the president in Russia. And at the same time, they are pouring poison into state media and into the presidency era behind his back. And so this kind of stuff, we normally don't get to see it as well as we got to see it. But it's both a quasi coup or attempted coup or what I would call an improvised coup. Most coups fail. This one sort of failed, but in an odd way, maybe not. It's an improvised coup, but it's a defensive reaction to his potential expropriation. You mentioned the June 10th announcement, which could only have come with President Putin's acquiescence. We don't know if Putin initiated it, but certainly he would have had to sign off on it, which was the death knell for Wagner as an independent force and therefore all of that business that's at stake. You can now see Putin trying to protect, trying to keep in play all the Wagner businesses from Syria through Africa and beyond without Progosian. The value of that to Russia is enormous. And so can Putin manage to retain that value without the guy who created it for the most part, Progosian? And what will happen to the people who sparked this by going after Progosian and that he then went after, but are still as it were in their positions. So what we don't know is much greater than what we do know, but this kind of stuff is what our authoritarian regimes are self-susceptible to.

I think that point that what we don't know is more than what we do know is really important for everyone listening here to keep in mind. And I think in some ways, one thing that underscores it is we're speaking on Wednesday, June 28th. And you mentioned this as being an improvised coup. And there's some new reporting sourced to US defense that suggests maybe is more improvised than people realized. So the Wall Street Journal has a story today. And I'm going to read just a bit of it here. They write, quote, mercenary leader Evgeny Progosian, plant a capture rushes military leadership as part of last weekend's mutiny. Western officials said, and he accelerated his plans after the country's domestic intelligence agency became aware of the plot. The plot's premature launch was among the factors that could explain its ultimate failure after 36 hours. And the story goes on to say that the plan was to capture the defense minister and the general during a visit that they were planning to a southern region that borders Ukraine.

So there was in some ways, again, according to this and sourced to Western intelligence, there was, according to this, a much more aggressive theory or plan here that then leaks and Progosian simply has to improvise and move faster. I'm curious what you make of that. Yeah, I would just be cautious about the word plan. You get into the archives of these regimes after they fall or even before they fall, if you're lucky. And the word plan would not be the first word that would come to mind. It's much more chaotic, much more improvised. In addition, you have a collective action problem for any coup. If you at the New York Times decide that the current executive editor is not to your liking, and you want to organize an action against the executive editor and bring that person down. Keep an eye out, Joe Kahn. Right. The first person you talk to is thinking, oh my God, is this a provocation? Is my loyalty being tested here? And that person has to then run to Joe Kahn and say, Joe, they're talking about an insurrection behind your back. And then he names who it is. And so you have a very hard time, even if you all agree that the person should come down, you have a very hard time trusting anybody

[Transcript] The Ezra Klein Show / What's Really Going On in Russia?

else with your desire to do that. Because they don't know if you're serious or if you've been sent by Joe Kahn to test their loyalty. And so this is what it's like inside an authoritarian regime, right? They don't trust their own elites. They can't trust their own elites. There's no trust among them. Or as we like to say, there's no honor among thieves. And so for them to organize a coup,

to have a plan, is extremely difficult. Because the first person who learns this is going to rat them out, or the second person, or the third person. And it's not a plan if it's one person. It's only a plan if it's many people, and you would need many people.

So maybe we always have to be careful of our excellent intelligence services manipulating us through leaks to shape stories. And I have a very high regard for the capabilities of our people who work in our intelligence services, their level of analysis, their humility, their self-correction when they don't get things right. But I wonder, we pick up eavesdropped conversations.

A lot of this is electronic or signal intelligence. And people talk. People chatter. People say things. They make stuff up. They make themselves out to be more important. They speculate. They say, I heard this rumor, etc. And so the chatter is one of the things that we get. Now, it's different when you see movement of tanks, movement of ammunition. That's what our intelligence people picked up. They saw the Wagner group stockpiling. And stockpiling not in the front where they were going or supposed to go towards the Ukrainians, but stockpiling in the rear. And so that was the tip-off that something was up. Because if you're stockpiling in the rear while you're complaining, you're not getting stuff. So here you are saying they're shortchanging you on ammunition. And you get this massive ammunition dump not far from Russian military headquarters running the war on

Ukraine. So I think that was a pretty big signal that our people picked up. And that's different from the chatter, the eavesdrop, bragging, boasting, or rumor mongering.

Well, to pick up on that. So when I look at these stories that have been coming out today, where American, I guess, intelligence officials, I mean, I'm not the one getting the leaks, but some members of the American intelligence establishment are telling newspapers that we believe that there was more of a plan here. The plan was more dangerous. And one of the pieces of intelligence here is that other generals or at least another general knew that there was somewhat more communication between Progosian and other members of the Russian defense establishment

than had been reported before. And you wonder, well, why is that being told to the American media? I mean, you have to suspect a little bit that there is an intention or an interest in making Putin feel that his own government and his own army is less trustworthy, more dangerous. Maybe there are more elements plotting against him than he thought in an effort, I would assume, to reduce the regime's efficacy. So that's my sort of internal media assumption of what I'm seeing. I'm curious if that seems right to you. Hell yeah, for sure. Their best general, who is anywhere near the top, Sergei Surovkin, he's the one that our intelligence services are implicating in the plot. And if you want to take out one guy from the Russian military who's competent and could do the war in Ukraine a lot better, he would be your target. Having said that, it could be true. I'm not disputing that there could be a basis in fact here. But yeah, the idea of targeting Surovkin, who supposedly was in with Progosian, knew that this was happening.

But you can spin this out, Ezra, forever. So let's say Surovkin knows. If he doesn't tell

[Transcript] The Ezra Klein Show / What's Really Going On in Russia?

President Putin, he's toast. So he's got to tell the president. He tells the president, but the president may say, that's crazy. Progosian would never do that. He's not that kind of guy. I know him way back from St. Petersburg days. So just because some people might have been in on it, or been told, or heard rumors, or warned about it, doesn't necessarily mean that through the chain of command, that had any effect or the kind of effect that it should have had for someone like Putin. But you have here a situation where, again, there's no trust. Everyone's got a predator. They're assigned to each other. These people are officially each other's enemies. And so you think they're all on the same side. They all wore the same jersey. They're supposed to be working to score in the Ukrainian goal, not in their own goal. But in fact, as we know from hundreds of years of history on the Russian side, Russia always fights a two-front war, one against whichever enemy on the battlefield and another on the home front, where the various factions are going after each other, hammer and tongue. And so we'll get the story eventually. This place leaks like a sieve, and they have almost no control over their electronics. And so we have an overload of information. And in our system, a lot of that will come out. Some of it's come out already, as you've been alluding to. But let's just wait before we make any far-reaching conclusions about who knew what and why, etc. So the improvisation, who knows? There might have been five ideas or six ideas. You get around talking over the campfire or on your cell phone with somebody else using signal, and you start throwing ideas off. What if we do this? What if we do that? What if we try this? What if when they come to the Rostov military headquarters, we take him hostage, and then they can't expropriate our businesses, right? So that's what we mean by a plan, I think, on the inside. And then the idea that things accelerate or things leak, and well, yeah, that's how every single coup is. And nobody knows what's happening on the inside of a coup. It's like a revolution. You don't know it's a revolution until afterwards, and someone writes a book telling you it was a revolution in some cases. In other cases, you're trying to instigate a revolution, and it doesn't work, or you're trying to instigate a coup, and these things are a mess on the inside. And they all fail until suddenly, in a few cases, they succeed unexpectedly to all those involved. Let's talk through what we sort of know, or at least sort of could see, that happened here. So the Wagner group turns into Russia. The forces enter Rostov, and they move through the city and move over a pretty good amount of land easily, and don't seem to pick up much resistance from the Russian military. And at a certain point, they really could. They're not far at all at this point from Moscow. So one thing that has been out there, at least in commentary, is that there is a lot of information that should make Putin look bad or be afraid, that there didn't seem to be more resistance to them. On the other hand, maybe just people didn't understand what was happening. What did you make of the initial ease of their march? Yeah, so this was what we call an unintentional referendum on the Putin regime, that he ended up catalyzing or organizing. So you start with the fact that this is about Ukrainian valor and ingenuity. Ukrainian resistance, Ukrainian courage on the battlefield, Ukrainian ingeniousness has put this pressure on Putin's regime. So this starts with them. And then, as I said, there are all of these inherent tensions within an authoritarian regime, a lot of which the leader

[Transcript] The Ezra Klein Show / What's Really Going On in Russia?

either instigates or tries to instigate, exacerbate. And now you've got the equivalent of an unintentional referendum. What do I mean by that? So when Xi Jinping in China does zero COVID, and it's very draconian, and the local governments are going broke testing everybody so frequently and lockdowns where there's no economic activity, and there's discontent as where you don't know what the other people feel. You know your feelings about the regime's policy, but you're not sure what the other people think because you have a censored media space, and it's also very costly to find out, to go out there on a limb, say some negative things and see what the reaction might be, or to engage your neighbors in the conversations that they might rat on you. But when Xi Jinping does this, he sparks protests from people who just can't take it anymore. So he effectively stages a referendum on the regime where people who are not happy discover that there's a lot of other people like themselves. That's something that the regime has kept hidden, as I just described. And then he goes from zero COVID, the draconian lockdowns, with this extremely frequent testing to let it rip COVID. That's also a version of the referendum because people see that the regime is not very competent. It turns out that they don't know what they're doing. It turns out that they don't know more than we know. It turns out that we can't rely on them, that the propaganda about how they're bringing prosperity to China, it's a lie. And so authoritarian regimes that catalyze these unwitting referendums can't put the genie back in the bottle. You can't restore the aura, the mystique of power, this mystique of power, the aura of power where you know more, you see more, you're more competent. Other people may think you're not doing that well, but it's just because around you there are minions who are not up to speed or whatever, but you are the one. You are the guy. And so once you lose that mystique of power, it's very difficult to get that back. That's what Putin lost in Ukraine well before this recent Progosian incident. The mystique, the aura, the magic of power was gone. Nobody believed he knew better. He knew what he was doing. He was smart. He was infallible. He was watching everything. He was controlling everything. The war exploded that. You know, you can be a military genius in propaganda, but war is something that really is revealing of whether that's true or not. And that's done. And this is prior to Progosian. So the mystique, the aura is gone. However, you have the mechanisms of power. You hold in your hand the levers of power. And those levers of power are so substantial. We underestimate what it means to sit in the Kremlin or to sit there in Beijing in charge of China. The levers of power are enormous and very far reaching. And this collective action problem of moving against them, as I said, is very high bar. And so Putin has this hollow regime that's still strong. It's paradox. It's hollowed out. The aura is not there. The mystique is gone. The corruption is now so corrosive, right? The corruption is the system. And yet it's destroying the system. So we're in this period now where Putin's regime has been shown not to have a lot of support. We had these surveys. Do you support the war in Russia? Or would you like to go to jail? Right? We've had a whole bunch of surveys like this. Do you support the war? Or would you like your children to be kicked out of school? Do you support the war?

[Transcript] The Ezra Klein Show / What's Really Going On in Russia?

Would you like to lose your job? Right? They don't ask the second question. It's implied in the survey. And the war that people support is also the war that they see on television, where it's Ukraine, it's NATO committing the aggression against Russia, and it's the fate of the Russian state, which is its state.

Now we see with this unwitting referendum that it turns out there's not a lot of support there. It turns out that people didn't rush to show their loyalty. They stood back. They were either apathetic or worse. Indifferent, yes, in most cases, but some were opposed. It's just too costly to show your opposition potentially until there's more clarity. And so he staged that referendum in a kind of emperor, no clothes fashion. Unintentionally, that's what Progosin just did. So even though the aura had been lost already, the mystique was gone.

And even though he still has the levers of power, he now has to look over his shoulder and wonder, who else was in on this? Who else wants to take me down? Who else are my potential enemies? And he's already paranoid because paranoia is the job description of an authoritarian ruler,

especially in these Eurasian regimes like Russia or China. And so now the paranoia becomes potentially even more dysfunctional, becomes a kind of self-fulfilling prophecy.

If he goes after them, he could further destabilize. If he doesn't go after them, he doesn't know if they'll be there for him. If another accidental crisis or structural crisis that's triggered by accident confronts him. And so it is destabilizing. But remember, these regimes, they're always brittle. They're all powerful and brittle at the same time.

And every day is existential for them. We here in America, we hyperventilate.

Four years of Trump, and it's the end of the world. It's the end of democracy. It's the end of America as we know it. And then we have even events like January 6th. And here we are on the other side of that, and America is still here. Now the other side is talking about how Biden, it's the end of the world. We'll never get through this. It's the end of the American way of life.

And I gotta tell you, at some point Biden will not be president anymore, and America will still be here. It's not existential for us. We're wrong to think that these kinds of problems in America are existential. But for authoritarian regimes, little everyday quotidian built in issues can become existential. They're subject to a kind of permanent potential political bank run on their regimes. You brought up the loss of mystique in Ukraine for Putin. And it seems like there's, at least from the commentary and analysis I've seen, another one here, which is pregosin is marching. They've taken a city. They've now been skirmishes with Russian military. They've shot at Russian military aircraft. And there's fear of him and Wagner marching on Moscow. And he doesn't do that, but nor has he killed or taken into prison or executed. What happens is it a deal is struck. And we don't know everything about the deal, but both the help of the Belarusian president Lukashenko. And from what we can understand, there are no criminal charges for pregosin. Pregosin is now in exile, not in jail. And there's a surprise, I think, that you can move against, I mean, he says he wasn't moving against Putin himself. He was moving against the defense minister and others in the administration, but you can move against Putin's government and survive. You can move against Putin's government and just go into exile. And that also seems to be

either a mystique losing moment for Putin or a new kind of information potentially for others in the regime. And also just something people didn't expect from Putin. He didn't seem like the kind of guy to take that and come to a quick negotiated settlement, as opposed to salt the earth with

[Transcript] The Ezra Klein Show / What's Really Going On in Russia?

the remains of his enemies. What did you make of that? The key element here, and I think the piece that I got wrong most substantially, well, I would say the biggest mistake I made in the heat of the moment analysis was the Belarus Lukashenko piece. So Alexander Lukashenko, a former collective farm chairman, has been running a Belarus like a collective farm for as long as I can remember. I forget when the exact date of his presidency dictatorship kicked in, but my hair was black and I had a lot more of it when he started.

So Lukashenko is in trouble. He has a tremendous opposition internally and he's arresting people who are rival candidates in elections and then arresting or pushing into exile their spouses. He's clamping down on every journalist he can and he's dependent utterly on Moscow to save his butt. So he shows up recently in Moscow at a meeting which is live on Russian television in that the first two minutes of the meeting where they let the press in.

You have that kind of meet and greet and the exchange words and Putin says, thank you for coming. Welcome to Moscow. Thank you for coming and Lukashenko says to Putin, what choice did I have? And so this is shown on television. That's the part that they show, not the part that they conceal. And so the guy's trading war and he intervenes in this crisis just very shrewdly and makes himself indispensable and potentially acquires the militia part of Wagner for Belarus. Moreover, he's now, everyone saw that Lukashenko saved the situation in Russia.

So rather than Lukashenko being under Putin's boot, now there's a quasi sense that Putin was at least dependent in this episode on Lukashenko. So that was quite a reversal of fortune, very clever intervention. We'll get the details eventually. Be careful. A lot of the details are going to be fake, but we'll be able to sort it out eventually. But I did not have Lukashenko being this clever. I thought he was in bigger trouble and would muff this and would come out worse as a result of this. But he's the one that's come out looking the best. And so where this is going, once again, I don't know the future and I don't have full information and we want to be as humble as possible in discussing what could happen further here. But one thing that's happened so far is that Lukashenko has returned the tables on Putin in terms of his own dependency, at least in the short term. And so if there's a winner here, and generally speaking, I don't think there are any winners yet. I mean, we'll get to the Ukrainian battlefield and counter offensive at some point, I'm sure. But Lukashenko comes out looking a lot better than I had him for. And so I stand corrected on that. Why didn't Putin smoke this guy? Pre-Gosian? Putin's got tremendous assets in the military sense. He's got everything he would have needed to smoke this guy.

And he didn't. And what does that mean? A lot of people speculating, does it mean it's because Putin was uncertain of the reaction that he would give the order and the military wouldn't implement it or that he would kill this guy and this guy would become a martyr and a hero and worse in death than he is in life? I don't know the answer to that. Those speculations to me are worthy of keeping an eye on. The other piece of this is that when they were marching on Moscow, they didn't galvanize the rest of the Russian military. In other words, the death squads, the special forces, the militia that Pre-Gosian controlled, known as the Wagner Group, wasn't gaining size like a snowball running downhill as it was marching. And so neither side, as it were, galvanized the public or galvanized the security and military structures. So it was a kind of stand off that neither side was sure that they could win or neither side, let's say, was confident in the potential outcome. Now Putin allegedly, according to reports, tracking the airplanes,

[Transcript] The Ezra Klein Show / What's Really Going On in Russia?

his plane took off and he went to Valdai, which is a presidential retreat between Moscow and St. Petersburg. It's possible the planes took off. It's also possible Putin wasn't on them. His planes are traveling in multiple directions all the time in order to scramble people not knowing where he's located at any given time. So did he flee Moscow? Did he flee the Kremlin or his Dutch outside Moscow? Let's wait to see if we get more hard information on that. But clearly didn't rally. But to go back to the point, Ezra, about the levers of power. So Putin has a Praetorian Guard. They are very, very substantial. He's got his own Wagner group equivalents. One of them is the so-called FSO, which is the old bodyguard directorate of the KGB, the directorate that guarded Gorbachev, the Politburo members. It was split off as a self-standing organization and it's colossal. Exactly how many soldiers does it have? I'm not sure. 20,000, 30,000. I've seen different estimates from people that I trust who have good information. But whatever the number is, it's big. And there's this guy Kochnev, who's in charge. He's a general. He's in charge. And they look like they are loyal to Putin right down the line. There's another group called the National Guard, which is run by this guy Zolotov. Zolotov was Yeltsin's bodyguard and was on the tank in 1991. If you know that famous picture of Yeltsin opposing the coup attempt by the security forces in the summer of 1991, just before the Soviet final collapse, and Yeltsin was up on that tank. And Zolotov was Yeltsin's bodyguard and is on the tank. He then became eventually a bodyguard for Putin. And now he is the general in charge of the National Guard. So you have the federal bodyguard directorate and you've got the FSO and you've got the National Guard. And so you've got these two really, really big militias that are as loyal as loyal can be. So that's a lot of protection. That's a nice cocoon to be living in. And if those guys don't defect, if those guys don't turn on you, it's very hard to bring this regime down because you can't get near the actual regime because it's in this cocoon. And so the machinations about whether to take progosian out or not, we still don't know. The skirmish that took place outside the city of Varonezh, which is between Rostov. Rostov is the city in the south where progosian was holed up in a bunker. The military headquarters of the Russian war aggression against Ukraine is in Rostov. And that's where progosian was in a bunker. He didn't go to Moscow himself. He sent several thousand fighters, 5,000, 8,000. We've seen different numbers. There was a skirmish outside Varonezh, which is between Rostov and Moscow. So it's on the way to Moscow, much closer to Moscow. But it's not clear what the circumstances of that skirmish involved because it looks like there were some helicopters that the Wagner guys shot down. But those helicopters were not attacking them. They were conducting surveillance over the March, kind of like when they tell you that things on the Gowanus are sluggish. They're looking at the traffic above New York City to try to advise people on their commute of all the idiotic roads to beyond, which is the least idiotic. Well, so they're watching with the helicopters and the Wagner guys just shoot the helicopters down because they don't know that the helicopters are just there for surveillance. And then a couple of planes also seem to have been shot down. It's not clear, once again, quite what those planes were doing, but it looks to be the case that they were not attacking the Wagner guys. So even the one area where there was a skirmish does not look like it was a two-sided skirmish. It looks like one side opened fire on the other without knowing what the other was up to.

[Transcript] The Ezra Klein Show / What's Really Going On in Russia?

And so I know it's hard to understand, but the uncertainty of the moment, the fact that we're not sure if killing Progosian is more beneficial, less beneficial to the Putin regime because he could be a martyr, and on it goes. This uncertainty is typical. There's a lack of decisiveness in the last many years of Putin's rule, kind of out to lunch, complacent, procrastinating, not making decisions and letting things hopefully resolve themselves naturally, kind of out to lunch, disengaged. In the early years, Putin would have prided himself on shooting things down, on killing people, on showing just how tough he was. We saw that in those Chechen wars when he first came to power. It's a different regime now, but I think it's more the uncertainty that was built into the situation as much as it was a lack of decisiveness. We don't know if he gave an order that wasn't implemented. We don't know with whom he was in contact. And the Lukashenko intervention, as I said, also might have changed the equation because you saw the press reports that Lukashenko blabbed. We have no idea if this is true, but he blabbed it. He talked Putin out of using force to kill these guys.

That could be just Lukashenko talking out of his, well, I won't say it, this is a family show, but you understand which part of the anatomy I have in mind here.

And so a lot of uncertainty, but the main issue remains that Putin lost the aura, has huge levers of power and loyalists, and is seen as the only alternative so far to the abyss. Right as this crisis was ongoing, resolving itself, Politico ran a good feature where they asked, I think it was 14 Russia Watchers, what they thought. And this goes, I think, to the point you're making there, but I was so struck by the range of opinion from this regime is rotting, Putin is vulnerable, this shows he's losing power, losing control, the elites are fractious, all the way to, this doesn't matter, the perversion was not moving on Putin, it was a last-ditch effort that maybe this even strengthens Putin by bringing the military closer to him, maybe he cracks down on the elites, maybe he doubles down in Ukraine.

And these are all people who are knowledgeable and have watched Russian politics for a long time, so I won't ask you to try to have an answer where one can't emerge or one can't be held solidly, but what kinds of information or what kinds of signals would you be looking for in the coming months to see if something has changed, to see if there are more cracks or more difficulty for Putin in managing the sort of elite coalition around him, or to see if he is as in control as ever?

Yeah, so if he uses somebody as the main instrument to crack down, in other words, he empowers somebody to put the lid back on. The problem with that is the person who puts the lid back on is immediately in everybody's eyes an alternative to Putin, not an alternative on the Democratic opposition side, but an alternative on the regime side, where it really counts. And so he's kind of stuck here. It's very paradoxical. He needs to put the lid back on. He needs to reassert his power. It can't be just the speech. He's made a couple of speeches already. The speeches have no effect, even with all the choreography that the manipulators, the spin doctors at the Kremlin can come up with, and they got a lot of great stuff ready. He was in front of the Palace of the Facets, one of Ivan the Terrible's palaces inside the Kremlin. He walked down the red carpet. You could see the Palace of the Facets right off to his left shoulder. It was tremendous imagery, but it's really just imagery on TV, and then it passes. And so how does he put the lid back on? Heads have to roll. Well, if heads roll, who's going to take their place? And if the people who take their place are competent people, then why don't they take the president's place? So in some ways, that helps explain how Lukashenko

[Transcript] The Ezra Klein Show / What's Really Going On in Russia?

could insert himself successfully. We know he tried to insert himself, but how was he successful? It's because maybe Putin saw that empowering the Belarusian dictator was less empowering domestically in Russia than anybody he would have tasked with putting the lid on at home. So there's that. There's watching the empowerment or refusal to empower somebody to put the lid back on, and how Putin manages to put the lid back on. Then there's the unravelling or unraveling of the Wagner global empire. Can Putin successfully bring that home, as it were, without progosian? And if so, who gets it? Does it go to Shoigu, the failed minister of defense? Does it go to Zolotov, the head of the National Guard, who has a militia but doesn't have the kind of businesses that progosian built because he's not on that level? So that's something else to watch. Other things to watch, of course, are the domestic fiscal situation. It looks like they've managed pretty well to not crash the economy and do much better than all the economists' predictions and expectations in terms of GDP decline and instability and macroeconomic instability. They've done pretty well. How long does that go on? The gulf between the revenues and the expenses has widened very, very significantly. And this is all about a bank run in the economic sense, not in the political sense, meaning if depositors in Russia think that they're going to lose their money, they're going to try to get their money before they lose it, which will create the situation of them losing their money, which also could crash the regime from a fiscal macroeconomic point of view. So that's a major point of vulnerability. The main thing to watch, of course, is the front, is the battlefield in Ukraine. So the Ukrainian counteroffensive has the potential to destabilize, maybe even cause, a battlefield bank run with the Russian army, which would have consequences potentially, not automatically, but potentially in Moscow. So far, the Russian side of the battlefield is held really well. That's both before the Progosian events and since. It's very early yet. A lot of people who know much more about military matters than I know, I've talked to them and they are convinced that Ukraine can do this, not that they will succeed, but they can potentially succeed, that there will be multiple counteroffenses, not just one, that this will be a longer protracted process potentially, and we should be less eager for results every minute while we're refreshing our screens. As General Cavoli, who is the Supreme Commander of Europe for the United States, and the Supreme Commander of NATO, and it's playing a very big role as a partner to the Ukrainians, as he told me not that long ago, Ukraine doesn't have to be the best army in the world. They just have to be the best army in Ukraine. And if that turns out to be the case, that could have political repercussions in Moscow. It's not automatic. Putin could ride out even a lost war. The problem with Ukrainian successes is Putin's capabilities to lash out, not on a global scale with strategic nuclear weapons, but on the scale of Ukraine. I worry about this more than anything else. You see, Russia doesn't need Ukraine. Ukraine needs Ukraine. And Putin's strategy has mounted to a failure, but he's now got a backup plan. And that backup plan is, well, I can't have Ukraine. Nobody can have Ukraine. And so we saw him blow up the dam on the Dnieper River, which was extraordinary. And people thought, oh, you know, he did that in order to blunt the Ukrainian offensive. It had next to no impact on the frontline on the Ukrainian side. And so you got to see that. That's a message. He's telling you that he's bombing the residences. He's bombing the schools. He's bombing the hospitals. They're committing rapes and other atrocities. They're destroying or looting Ukrainian cultural artifacts. That's what this is about now. I can't have it. Okay,

[Transcript] The Ezra Klein Show / What's Really Going On in Russia?

nobody can have it. And so you're looking at that Zaporizhia nuclear power plant, pretty much on the same location as the river, just a little bit more upriver.

And you're thinking, oh my God, if it goes up in smoke like the dam, what happens to Ukraine? He can irradiate Ukraine without even using a nuclear weapon for generations, kind of Chernobyl style, but deliberately rather than accidentally. I'm not saying he's going to do that. I have no idea what his plans and intentions are, but he has that capability. And that worries me because you can win the war and you win back territory and it's irradiated. And so we have to take those capabilities out of his hand.

Let's end then on the point of

how Ukraine could get some of the capabilities that would take some of those capabilities out of Putin's hand. And a lot of that comes from the calibration of Western support and material and money in industrial capacity. And so far there's been no evidence that the events of the Wagner Mutiny had any real effect on Russian battlefield presence. But a world in which the West sees Putin's regime as under more stress, as beginning to crack under the pressure of flailing about in Ukraine is possibly a world where there's more Western commitment. I mean, there has been a fair amount of Western commitment to Ukraine, but it is always calibrated. They're always giving just enough and no more. They're not giving the thing Ukraine would really like to have on the battlefield and they give some of that but not the next thing. And one plausible consequence of this is a sense in the West that maybe this is working. Maybe Ukraine has a better shot of to some degree pushing the regime into crisis in a way that would be a meaningful outcome for them. Do you think that's true? We hear every day that the world order is at stake in Ukraine, and yet we also hear at the same time that we can't put any of our soldiers or NATO soldiers into Ukraine. So we've done quite a lot, an extraordinary amount, and it's been fantastic because the Ukrainians have made the sacrifices that they've made and they've used our stuff, but they've used also the vast majority of what they've used successfully has been Soviet era kit, Soviet era weaponry that's sure has been rejiggered, has been improved. Also the drones that the Ukrainians themselves rejigger in order to carry grenades. They need to evade the Russian electronic jamming and everything. It's been extraordinary what they've accomplished and our support for it, and it's inspiring to see that. It's inspiring to see the revival of the West. Yes, there is now a renewed sense that Ukraine can do this, just like there was after the Kharkiv offensive, which was another success on the Ukrainian side that happened in an earlier phase of the war where they pushed the Russians out of that big province around the city of Kharkiv, and people said, oh, Ukraine can win this. Now we should support them even more. That's just not a way to understand this. This is the ninth year of the war going back to 2014 when Putin took Crimea and then not long after that supported or instigated the uprising in eastern Ukraine, so-called Donbass. This is a generational problem where Ukraine has to win the peace over the long haul. Winning the peace means not just preserving the existence of your nation and the sovereignty of your state. That's what Ukraine has achieved so far. It means joining the West, becoming a Western-oriented, Western-integrated, prosperous, non-corrupt, rule of law, democratic society with a dynamic new economy, not the old Soviet-style economy of heavy metal that they had before. That's not a one-day or a one-week or a one-counteroffensive or one-year proposition. That's a multi-year proposition. Here, the conundrum of Crimea will come into play, which is a almost exclusively Russian ethnic area that Ukraine is trying to reclaim

[Transcript] The Ezra Klein Show / What's Really Going On in Russia?

since it was illegally annexed by Russia. We have questions like that. Alexei Navalny, the opposition figure in Russia, who is in prison now and looks like he's going to get his prison term extended even more on fabricated charges, Navalny has said that Crimea is Russian territory. Boris Yeltsin, before Putin, demanded Crimea back from Ukraine. How Ukraine lives alongside Russia? How they win the peace. How they are able to join the West, get a security guarantee, enter the European Union. For all its faults, the European Union is the best path forward for Ukraine, and they would all recognize that as victory winning the peace. How all of that happens over the generations so that this doesn't happen again, two years from now, 10 years from now, 20 years from now. We want a situation in which Russia is not incentivized to do this again, whether that's under the Putin regime or after.

And so a victory on the battlefield in the short term, taking back some territory, reclaiming territory that's of course ruined, it's completely flattened, it's rubble, getting the refugees back into the country, getting the Ukrainian children back in Ukrainian language schools from abroad. All of that is critical for the survival of Ukraine going forward. But what's also critical is they're going to live next to Russia, and Russia is not going, you can't pick up Russia and move it to the other side of China. And so you can arm yourself to the teeth, porcupine style, maybe. Someone's got to pay for that, and that also has repercussions on your domestic institutions, on your liberty, and I could go on. And so being a state that's a garrison state has many domestic implications that we should be careful about encouraging. Russia needs to have a stake in the international system in some fashion.

It can't be incentivized only for spoliation, only for wreaking havoc, only for doing nasty things out of spite, whether it's to Ukraine or to somebody else.

Russia is in terminal decline right now. They are on a pathway they're so weak, and in order to overcome their weakness, they're making themselves even weaker.

Putin is achieving the exact opposite aims that he set out to achieve. Gorbachev did the same thing. Gorbachev set out to make Russia stronger, and he made it weaker. He did it with a bet on the West, partnership with the West. Putin started out with the partnership with the West. Eventually, he decided it was anti-Westernism that he would make the big bet on. But either way, Putin has done even more damage to Russia's strategic position than Gorbachev ever did, unwittingly. And so Russia has just too many capabilities and its geography, and I could go on for it to be completely outside the international system. It's committed these crimes. I understand that it needs to pay the price for those crimes. I'm just worried that we have to understand better how to win the peace over the generations.

I think that's a good place to end, so then always our final question. What are three books you'd recommend to the audience? Oh my god, only three? Seriously, Ezra? I apologize.

I read about 120 books a year, on average, unless I get distracted. Let's do one in biography.

I would probably recommend the John Richardson Picasso, but it's four volumes, so let's leave that aside. Let's do the Jackie Wohlschlusser Shigal biography. It's my favorite biography in the arts. I'm writing a biography myself of an artist, well, of a political artist, in a way. And so I'm very favorably disposed towards great biographies. And Shigal is from Vitebsk, and that happens to be the city where my father's side of the family is from. If you know those Shigal paintings of those peasants flying in the air out of the village, that's my family. Anyway, Wohlschlusser's Shigal is great. I do a lot of stuff on China. I read just about every book on China. A very hard decision here. I wish I could mention a hundred of them. I won't do

[Transcript] The Ezra Klein Show / What's Really Going On in Russia?

Eric Schwartzl's Red Carpet, which is one of my favorites, because I've done that on someone else's podcast, so I'll do Scott Roselle, Invisible China. I think that's the China book that your listeners would learn the most from of all the China books, because it's just so unexpected and it's so data rich, Invisible China. And then third, let's do American history or American policy. We live in America. I try to keep up. Pekka Himalainen's Indigenous Continent. I won't do that here, because I did that on a previous podcast. So I'll go for David Bernstein, classified, which is the untold story of racial classification in America, which is also full of incredible surprises and is right on point for where we are in the culture today. I really appreciate it. I've never heard this strategy before, but it worked well of saying, I'm not going to do this book. Wink, wink, nudge, nudge, but here's the book I'm recommending. Nice way to expand the ambit there. Stephen Cotkin, thank you very, very much. Ezra, it was my pleasure.

This episode of The Ezra Klein Show is produced by Emma Volgaou and Kristen Lin, fact-checking by Michelle Harris with Roland Hew, Mary Marge Locker and Kate Sinclair, engineering by Jeff Geld and a famed Shapiro. Our senior editor is Roger Carma. The show's production team also includes Annie Galvin. There's original music by Isaac Jones, audience strategy by Christina Samaluski and Shannon Busta. The executive producer of New York Times' opinion audio is Annie Rose Strasser and special thanks to Sonia Herrero. you