



Russia

A Guide to Leadership Change in Russia

23 January 2024

The following report is for the addressees' use only. Please consult Earendel Associates Ltd (office@earendelassociates.com) concerning any further distribution

**Earendel
Associates**

Summary

- Leadership change in Russia will happen although the timing is unpredictable. In Russia's system of governance, the likeliest proximate cause is a loss of elite support for an incumbent. Plausible scenarios that might trigger elite defection would be: a decisive military reversal or defeat in Ukraine; a build-up of war-related pressures that eventually overwhelmed Putin; and Putin's death or incapacitation. His departure would lead to heightened uncertainty. But this would not be the same as instability.
- When leadership change happens, Russia's powerbrokers will have to identify a new President. Because there are no formal mechanisms for overseeing a succession, much will depend on the informal elite channels and practices of the 'network State'. Russia's elites will have powerful incentives to come together to choose a new President but might still struggle to agree on a successor.
- Assuming an orderly leadership succession took place, the priority for the new leader would be to consolidate his position. Even if it progressed more or less smoothly over time, the process of consolidation would still present daunting political challenges. A new leader might encounter resistance as he sought to solidify his position.
- More dramatic variants of 'collapse', such as a significant and lasting dysfunctionality of State institutions and the breakdown of central State institutions and/or the Russian Federation are conceivable. Again, however, they would *not* be inevitable.
- At each stage following a leadership succession, there would be multiple forks in the road as events unfolded – and, accordingly, multiple opportunities for Russia's elites (and society) to act to avoid sliding down the 'slippery slope' to disaster.
- Prior consideration of the likely process of leadership change in Russia – how it might happen, and what the plausible stages and turning points would be – will enable political and corporate leaders in the West to keep abreast of events and to judge their trajectory. This will enable some warning of instability (or, unlikely though it is, 'collapse') following the uncertainty that a change of leader in Russia would inevitably bring.

Introduction

It is often thought that leadership change in Russia would lead to 'collapse'. Because Putin has been so dominant a leader for so long and is pivotal to the functioning of Russia's increasingly autocratic political system, it is widely assumed that his departure from office, or even a significant weakening of his grip on power, would herald potentially disastrous instability. In this context, 'collapse' is rarely defined but implies an ineluctable slide from a change of leadership, through crisis and instability, to chaos and catastrophe – the 'slippery slope' theory. Yet how solid is this assumption?

One reason for asking the question is that leadership change is going to happen at some point. By some yardsticks, Putin is already an old man. Now 71, he is Russia's first septuagenarian leader in four decades.¹ There is of course no way of knowing when his leadership will finish. If he runs in the presidential election in March, as he says he will, he will almost certainly win, and win big. Another full term, Putin's fifth as President, would take him to 2030. If he made it that far, the Constitution would allow him (subject to re-election) to continue as President until 2036. He would then be 83, just two years older than US President Joe Biden, and – a more apt comparison – still 10 years younger than Robert Mugabe was when he was forced to stand down. At that juncture, one option would be to amend the Constitution again so that he could stay in office beyond 2036. Yet even though Putin's Presidency may not end any time soon, his advancing years invite speculation about what could happen if it did.

Russia's war in Ukraine adds to the conjecture. It has greatly raised the potential dangers facing Putin. It is possible, even probable (some judge), that his Presidency will weather the myriad war-related pressures now bearing down upon Russia (indeed, if Russia is victorious, his hold on power might well become even stronger). Putin certainly seems to think so. In his mind, Russia can outlast the 'collective West', which in his view lacks the stomach to support Ukraine in a drawn-out fight. When, as Putin expects, Western resolve cracks, Ukraine will have to surrender on his terms. Until then, his priority is to batten down the hatches at home. To that end, the purpose of the forthcoming presidential election is to enhance his aura of invincibility and his image as the guarantor of domestic stability (even though he has undermined Russia's security by launching a war that he expected to win quickly). But even if Putin faces no obvious immediate threat, the war has nevertheless reinforced doubts about how secure his Presidency really is. Last June's abortive 'Prigozhin mutiny' revealed a regime that is susceptible to paralysis in a crisis and, quite possibly, is more brittle than it outwardly appears. A major battlefield reversal in Ukraine could expose these internal vulnerabilities once more.

The war in Ukraine prompts a final observation. The 'slippery slope' theory is advanced by some of those in the West who want support for Kyiv to end and/or who argue that Ukraine should be pressed to the negotiating table. According to this logic, a Russian military defeat might fatally undermine Putin, toppling his leadership and, as a consequence, tipping Russia into chaos.² Kremlin propagandists sound the same warning as they seek to discredit domestic opponents as enemies of the State and to intimidate Western audiences. In short, fear of a 'slippery slope' is frequently exploited for a range of ulterior reasons. As one Russian analyst has noted, "The devil you know" is a powerful argument, but it is too firmly in favour of the devil.³

¹ Putin is three years younger than Konstantin Chernenko, who died in 1985, aged 74; two years older than Yuri Andropov, who was 69 when he died in 1984; four years younger than Leonid Brezhnev, who died in office in 1982, aged 75; a year older than Nikita Khrushchev was at the time of his ouster in 1964; three years younger than Stalin, who died in office in 1953, aged 74; and 18 years older than Lenin, died in office in 1924, aged 53. If Putin reaches 80, in 2032, he will become Russia's oldest ever ruler, having lived longer than Saint Olga (890-969).

² Again, it is rarely if ever spelled out how and why chaos would happen; or, if it did, what it would look like and how it would necessarily imperil Western interests.

³ Ekaterina Shulman, 'Bureaucracy as the Pillar of Stability: Are There Any Real Institutions Inside the Russian Political Regime?', Carnegie Endowment for International Peace, 8 December 2023, <https://carnegieendowment.org/politika/91195>.

This paper tests the ‘slippery slope’ theory. It makes two key arguments. First, although a change of President would trigger heightened uncertainty, that is not the same as instability; nor would instability be inevitable. Second, more dramatic conceptions of ‘collapse’, although conceivable, would by no means automatically follow leadership change, would be highly contingent and, accordingly, would be even less likely to materialise. Looking beyond the initial point of leadership change is like peering into thickening fog: it quickly becomes impossible to discern much that is definite or plausible as possible developments and variables are lost in a darkening haze of uncertainty and supposition. Despite these uncertainties, this paper sheds light on some of the *potential* choices that would confront Russia’s political class, some of the *potential* paths that it might decide to take and some of the *potential* outcomes that might begin to form, over time, following a change of leadership.

The ‘network State’

Russia’s political system has been described as a ‘network State’.⁴ This is a hybrid model in which formal institutions of government – the set of legislative, executive and judicial organs that constitute its system of governance – have been hollowed out and inhabited by dense constellations of elite-level patron-client networks. The functioning of institutions relies heavily on informal practices and personalised relationships that effectively act as the ‘hard wiring’ of the system. This means that, in Russia’s hyper-presidential constitutional order, political stability ultimately depends on the legitimacy of the President – the belief that he has the right and the capability to govern – among key sections of the elite. Maintaining elite cohesion and loyalty is therefore vital to ensure the Presidency’s control of the ‘administrative resource’ – the bureaucratic machinery (particularly, the security and law-enforcement agencies), and the economic and media tools, at the disposal of the State. The proximate cause of leadership change in such a system is almost always the evaporation of support for the leader among elite groups. This can be rapid in a crisis, producing the political equivalent of a ‘bank run’ and the disintegration of an incumbent leader’s position, as happened in different ways to Soviet leaders Khrushchev and Gorbachev.

Plausible variants of ‘collapse’

How might we visualise ‘collapse’ in Russia? Three plausible variants are listed below in ascending order of likely seriousness:

- Variant I: enforced leadership change and a post-Putin leadership succession;
- Variant II: a weakening of the central authorities leading to a significant and lasting dysfunctionality of State institutions;
- Variant III: the breakdown of central State institutions and/or the Russian Federation.

Variant I: enforced leadership change and a post-Putin leadership succession

What might this Variant look like? First, we need to consider how it might plausibly come about. Three scenarios are sketched below. Scenarios I and II envisage crises that fatally weaken Putin’s domestic legitimacy, triggering elite defection from his leadership and forcing him from power (perhaps on the pretext of ill-health)⁵

⁴ Vadim Kononenko and Arkady Moshes, (Eds.), *Russia as a Network State: What Works in Russia When State Institutions Do Not?*, Basingstoke: Palgrave Macmillan, 2010.

⁵ As a pretext, the plotters against Mikhail Gorbachev in August 1991 claimed that he had stepped down because of ill-health.

or leading to his arrest and/or assassination (perhaps dressed up as an accident or an unexpected death). In theory, Putin could also be impeached, although making that happen would be exceptionally difficult.⁶

- **Scenario I:** a decisive military reversal or outright defeat in Ukraine. Given the strategic and symbolic importance of the 'special military operation', this could have a shattering effect on Putin's domestic standing. In this case, latent intra-elite tensions and unease caused by the war – which almost certainly are real and widespread, if largely hidden – might quickly bubble to the surface and, if the security establishment was paralysed or divided, could prove impossible to contain.

- **Scenario II:** a gradual build-up of political and economic pressure that eventually overwhelms Putin's leadership. This might be the product of some or all of the following: military attrition and mounting casualties in a grinding war; growing weariness among sections of Russia's population (perhaps in regions suffering particularly heavy casualties); the cumulative impact of Western economic sanctions; a fall in commodity prices; and continued low GDP growth that aggravates existing sources of popular discontent (e.g. endemic corruption, poor public services). Such problems might combine with a battlefield setback in Ukraine or a chance event, perhaps unrest in a major Russian city or a disaster caused by the failure of a piece of strategic infrastructure. It is possible that this eventuality would crystallise over time. If so, signs of mounting strain on the regime might become detectable during an incipient crisis even if a tipping point remained impossible to predict.

- **Scenario III is different:** Putin dies or is incapacitated and is unable to continue as President. By definition, death would mark a definitive end to his leadership. By contrast, incapacitation (whether physical or mental) would generate considerable legal uncertainty.⁷

A managed succession....

If leadership change did take place, the first challenge for Russia's powerbrokers would be to handle the transfer of power to a new President. Because Russia's system of governance lacks an institutionalised forum for this, such as the Politburo or the Central Committee of the Communist Party of the Soviet Union (CPSU),⁸ in the first instance a change of President would spark heightened political uncertainty. The departure of such an experienced, authoritative and charismatic leader as Putin would be an aggravating factor.⁹

Russia's Constitution offers little guidance about how a succession would unfold. Under Article 92.2, an election for a new President must be held within 90 days of an incumbent ceasing to hold office. In accordance with Article 92.3, the Prime Minister would temporarily assume presidential powers. Otherwise, the Constitution is silent. The absence of a formal mechanism to oversee the succession means that from the outset a critical issue would be whether elite groups cooperated to manage the transition in an orderly way or whether they

⁶ Under the Constitution, at least one-third (150) of members of the State Duma (lower house of Parliament) must support an initial indictment of the President. This has to be accompanied by an opinion from the Supreme Court and the Constitutional Court. The Duma then forms a special Commission to consider the indictment. If the Commission finds in favour of impeachment, this conclusion must be endorsed by two-thirds majorities of both the Duma and the Federation Council (upper house of Parliament), or 300 and 114 votes, respectively. The Federation Council must vote within three months of a vote in the Duma, otherwise the charges against the President are considered void.

⁷ Article 92.2 of Russia's Constitution identifies 'persistent inability' to carry out the responsibilities of the President as grounds for removal from office. A President could voluntarily stand down on these grounds. Otherwise, there is no legal definition of 'persistent inability' nor any indication as to who would be responsible for reaching such a conclusion. Attempts to clarify this question in the 1990s, when Yeltsin's ill-health was a persistent source of speculation and political uncertainty, came to naught.

⁸ Some analysts have suggested that bodies such as the Security Council or the State Council, which are purely advisory bodies attached to the Presidency, could be adapted to perform this role. Another entity that has been the subject of similar speculation is the Coordination Centre, created in October 2022 and chaired by the Prime Minister, to oversee 'mobilisation' measures in several Russian regions bordering Ukraine.

⁹ Further underscoring the importance of Putin's personal role, recent years have seen a proliferation of para-constitutional bodies answerable solely to him that short-circuit important formal political institutions.

failed to cooperate, thus creating the possibility of a contested transition. Much would depend on the informal practices of the 'network State'.

Russia's elites would have powerful incentives to come together to choose a new President. For everyone concerned, this would be a period of uncertainty, stress and anxiety: much could be at stake in terms of access to power and wealth, possibly even physical safety. Worries about the breakdown of internal order – fanned by memories of the 1990s and, ironically, the Putin regime's own 'slippery slope' narrative – would plausibly persuade key decisionmakers to bring the interregnum to a speedy close; identifying a lowest-common-denominator successor would be the obvious way to do this. Another reason for bringing the succession to an early and expeditious conclusion would be to establish control over strategic branches of the economy to support political stability by buying the support of key constituencies (and simultaneously enriching those patron-client networks able to claw themselves to the top of the system). In this version, then, Russia's elites would settle on a successor to Putin who was broadly acceptable to the main interest groups.¹⁰ The next logical step would be to arrange a tightly controlled election to legitimise their choice. If the key elite groups – particularly, the armed forces, security services and law enforcement agencies – remained broadly united, thus controlling the 'administrative resource' and effectively presenting the election outcome in advance as an accomplished fact, electors would probably rubber-stamp this individual's candidacy. The post-Putin era would begin.¹¹

....or a contested succession?

It cannot be ruled out, however, that Russia's elites might struggle to find common ground. So far, all presidential successions in the country's post-Soviet history have been engineered handovers of power from an incumbent leader to an anointed successor.¹² The Variant under consideration here would be very different. Putin's departure would come as a shock and, depending on the circumstances, could paralyse parts of the political system. The paralysis that briefly occurred during the Prigozhin mutiny provides an idea of what could happen. Without Putin's authority and proven ability to mediate among elite clans, Russia's kingmakers might be unable to identify an agreed successor or to reconcile competing claims on power, assets and responsibilities. Clashes of personality and sectional interest could prove to be intractable, creating temptations to settle scores with political and commercial rivals.

One possibility is that such intra-elite disagreements would prove temporary. If they were overcome and Putin's successor were agreed within the 90-day period specified by the Constitution, the fall-out – worsening uncertainty and possible instability – might well be contained. But if uncertainty persisted, it could sharpen and harden intra-elite differences. By then, tensions might be spilling out into the open, as happened in 1998-99,¹³ and lead to a contested presidential election, with different sections of the elite squaring off against each other and backing different presidential candidates. Potentially more destabilising still would be a situation in which Russia's elites failed even to agree to hold an election. In that case, the succession would remain

¹⁰ This raises the possibility that a new President might be part of a collective leadership, similar to those that followed the deaths of Lenin and Stalin, and the overthrow of Khrushchev – each of them, in their own ways, dominant leaders.

¹¹ Conceivably, another way to manage the succession would be for the President and Prime Minister to swap positions, as happened in 2008, when Putin and Medvedev exchanged roles. This option was, however, discredited by the experience of Medvedev's Presidency (2008-12), which was dogged by speculation about who, in reality, was in charge. In addition, Putin suspected that the US attempted to exploit this uncertainty to play him off against Medvedev by means of the 'reset'.

¹² Yeltsin to Putin (1999-2000), Putin to Medvedev (2007-8) and Medvedev back to Putin (2011-12). The first was managed relatively late in the day but still facilitated a broadly smooth succession.

¹³ In the end, the crisis of 1998-99 did not lead to a contested presidential election although for a while it looked as though it would. It did, however, generate a great deal of uncertainty. This did not end until the Duma election of December 1999, which resulted in the defeat of the main anti-Kremlin political party, paving the way to the handover of power from Yeltsin to Putin.

effectively open and unresolved.¹⁴ In turn, political deadlock might open the door to an outcome that resembled Variant II. Equally, the prospect of such an eventuality could well concentrate minds, dragging elites back to the idea of compromise and a managed succession.

A managed process of leadership consolidation....

If the transition to a post-Putin leader did take place, the priority for the new President would be to consolidate his position.¹⁵ Consolidation is defined here as the assertion of effective control over the 'commanding heights' of the political system and the economy, and the construction of a base of legitimacy among elite constituencies sufficient to sustain the new leadership for at least one full (six-year) presidential term. Russia's centralised Presidency – the fulcrum of the political system – would be a potent tool in the hands of a new leader as he went about this task. As he did so, he might well win broad support from elites (and social groups) relieved at the possibility of renewed political certainty and stability. In addition, the new leadership would be a magnet for sections of the elite that had perhaps stood on the sidelines during the succession but were now keen to secure their futures in the new order.

If leadership consolidation proceeded more or less smoothly over time, it would still involve daunting challenges. Even an orderly transition would involve a reallocation of seats among members of the elite scrambling to sit at the top table – and therefore at least some turnover of personnel, and at least some redistribution of power and wealth.¹⁶ Managing such a process would test the leadership qualities of a new ruler, however adept and authoritative. Consequently, the process of consolidation might well take the entirety of a presidential term.¹⁷ And even if it came to a satisfactory conclusion, it would almost certainly entail the use of highly authoritarian methods to impose the new President's priorities.¹⁸

....or a contested process of leadership consolidation?

Alternatively, Putin's successor might encounter resistance as he sought to solidify his domestic position. As noted, even a broadly successful consolidation that did not disturb the foundations of Russia's system of governance would create winners and losers. It is possible that the elite coalition that initially underwrote the succession would fracture, perhaps because of disagreements over the distribution of assets and responsibilities, perhaps because the new President started to assert himself in ways that his erstwhile partners and sponsors found threatening.¹⁹ Opposition to him might be accentuated by fresh problems, such as another economic crisis (of which there have been several since 1991). If attempts at consolidation aroused substantial internal resistance, it is highly likely that Putin's successor would resort to increasingly authoritarian methods of governance.²⁰ If these failed and if the new leader was unable to secure his hold on power, a more serious outcome, perhaps akin to Variant II, might start to take shape.

¹⁴ If the war in Ukraine had been lost, a likely further source of instability would be an angry, mutilated army and thousands of battle-hardened (and traumatised) veterans returning to Russia.

¹⁵ This paper assumes that Putin's successor would be male.

¹⁶ As shown by the experience of Medvedev's Presidency, which witnessed a significant turnover of personnel, and transfers of formal responsibilities, among the Medvedev and Putin entourages – and a struggle between them for supremacy.

¹⁷ For example, the consolidation of Putin's regime arguably took the entirety of his first term (2000-04). The presidential term was changed from four years to six in 2008. When Putin was re-elected President in 2012, it was therefore for six years.

¹⁸ Again, Putin's first term of office is an informative example. Besides waging war to stamp out Chechen separatism, his recentralisation of power in the rest of Russia entailed the use of some brutal measures to bring recalcitrant regional governors and business 'oligarchs' to heel.

¹⁹ An example, once more from Putin's first presidential term, would be the tycoon Boris Berezovskii, who became an increasingly outspoken opponent of the Kremlin and was eventually forced into exile.

²⁰ Extreme historical precedents would be Yeltsin's successful use of the army against his parliamentary opponents in October 1993 and his use of military force during the first war in Chechnya (1994-96).

Chechnya: a wildcard?

The issue of Chechnya warrants a special mention. Legally and politically, Chechnya is an outlier among Russia's regions. Stability there rests on an understanding between Putin and the leader of Chechnya, Kadyrov. In return for keeping order and paying fealty to the Kremlin, Kadyrov is allowed to run the republic as his fiefdom (on the basis of personal directives, the widespread application of Shariah law rather than federal legislation, and the operational subordination of federal executive bodies in Chechnya to him).²¹ Putin's departure would put the future of this arrangement in doubt. It would also raise questions about Kadyrov's role in a leadership transition; the relationship between him and sections of Russia's security services that have long wished to cut him down to size, even to eliminate him; and whether he would pick sides in a contested succession or a contested process of leadership consolidation.²² Some even suggest that the fall of Putin would ignite a renewed crisis in relations between the Kremlin and Chechnya, raising the spectre of a conflagration in the North Caucasus that might then spill into the South Caucasus.

Although it would be a mistake to ignore the potential for uncertainty, even instability, it would be equally mistaken to overlook those forces that favour stability. The memory of two hugely destructive wars (1994-96 and 1999-2009) would be a reminder of the potentially horrendous costs of letting events spiral out of control. Chechnya, still one of Russia's poorest regions, relies heavily on federal subsidies. Another push for secession would almost certainly lack support elsewhere in the Russian Federation, let alone internationally. Finally, it is not obvious why Putin's departure *in itself* would cause Kadyrov to raise the flag of secession. Arguably more plausible would be a phase of manoeuvring and negotiation between Chechnya and the Kremlin, in the context of a leadership transition and/or a subsequent period of leadership consolidation, during which relations were reviewed and perhaps peacefully relitigated. Only if this attempt at bargaining failed might the possibility of Chechen secession again become a live issue.

Variant II: a weakening of the central authorities leading to a significant and lasting dysfunctionality of State institutions

This would clearly have greater potential for disorder than Variant 1. What might it plausibly look like? One reference point would be Russia's constitutional crisis of 1991-93, which pitted the Presidency against the Parliament. This was eventually resolved by Yeltsin's use of military force against his hardline parliamentary opponents in October 1993,²³ but only after a debilitating power struggle that greatly undermined the central authorities' ability to run the country effectively. In particular, regional leaders seized opportunities to assert varying degrees of autonomy from Moscow (in Chechnya's case, even proclaiming independence). Another example would be the crisis of 1998-99, which was sparked by a global financial crash that coincided with the latter stages of the Yeltsin Presidency and which threatened to provoke a contested presidential succession. By this juncture, the constitutional faultline that had driven the crisis earlier in the decade had been repaired (following the adoption of the 1993 Constitution). Yet Yeltsin was still hamstrung by an underlying deficit of

²¹ In addition, Kadyrov controls a personal army, notionally subordinated to the National Guard, and is believed to exercise effective influence over the large Chechen diaspora elsewhere in Russia, including the Chechen community in Moscow.

²² For example, it is believed that Kadyrov is a political ally of Viktor Zolotov, Director of the National Guard and a longstanding personal associate (and former bodyguard) of Putin's – and therefore someone who might play an important role in a succession to a post-Putin leadership.

²³ The crisis of 1991-93 stemmed from competing visions of Russia's constitutional order – presidential or parliamentary. Such a conflict would almost certainly be absent from a succession to a post-Putin leadership.

legitimacy – stemming partly from his own actions²⁴ – that prevented him from governing effectively, again particularly in the North Caucasus.

As noted, something like Variant II might plausibly develop out of a contested leadership succession and/or a contested process of regime consolidation. In addition, it could plausibly come about if Putin remained in office but was ground down by a confluence of factors similar to those described above in Variant I, Scenario II.

Once more, however, none of these sequences would be inevitable. To set off a chain of events that eventually culminated in an outcome like Variant II, a contested leadership succession or a contested process of leadership consolidation would arguably have to be protracted.²⁵ The crisis of 1998-99 is instructive: it was rooted in deficiencies of governance (for instance, the lack of an agreed dispensation between Russia's central authorities and regions) that had festered for years; like the crisis of 1991-93, it was also caused by deep-seated economic problems.²⁶

In any case, a significant and lasting weakening of central power – or even the possibility of it – might easily galvanise elites (supported by active sections of society) to press for the re-establishment of stable central government. Indeed, this is what happened in Russia from the mid-1990s onwards; the eventual personification of the broad demand for stabilisation and order at the time was of course Putin, who pursued this agenda to widespread domestic acclaim during his first two presidential terms (2000-08).

An outcome along the lines of Variant II would therefore be highly contingent. As noted, it might plausibly evolve out of a contested leadership succession or a contested process of regime consolidation. But *in itself* the fall of Putin would not inexorably lead to 'a weakening of the central authorities leading to a significant and lasting dysfunctionality of State institutions. It is also highly debatable whether such a comprehensive unravelling of State power would take place quickly.²⁷

Variant III: the breakdown of central State institutions and/or the Russian Federation

How might we visualise this Variant? The collapse of Tsarist Russia in 1917 is one historical example that comes to mind. Another is the break-up of the USSR in 1991.

Such extreme eventualities are, however, exceptionally unlikely to materialise. They would be even more contingent than an outcome like Variant II.²⁸ It is therefore virtually inconceivable that *on its own* Putin's departure regime would segue, via the 'slippery slope', to such catastrophic conclusions. And even if, against the odds, something like Variant III did eventually come to pass, it is almost certain that it would do so only after a lengthy period of time.

²⁴ For example, the violence in Moscow in October 1993 tarnished Yeltsin's domestic standing for the remainder of his time in office.

²⁵ On the other hand, wartime mobilisation under Putin, coupled with international factors (e.g. sanctions, loss of energy markets in Europe), has put severe strains upon the economy. Under the rigours of war and the Putin regime's tight control, it carries on. But once Putin goes (and/or the war stops), the faults and fissures could widen dramatically. Economic crisis has a dynamic, and creates scenarios, of its own – particularly at times of leadership change. It is impossible to insulate the political sphere from such tensions.

²⁶ Arguably, the economic phenomenon that did the most damage to the reputation of the Yeltsin regime during the 1990s was the problem of mountainous budgetary and inter-enterprise payment arrears.

²⁷ Quite possibly, the opposite. Following on from footnote 25, economic crisis could prove to be a catalyst for elite consolidation around a new President and, from there, a reconstitution of authoritarianism.

²⁸ Indeed, it would almost certainly have to be preceded by Variant II or an eventuality like it.

The case of 1917 underlines how improbable such an outcome would be. The downfall of Tsarism resulted from a confluence of several catastrophic trends and events: the steady degradation of the legitimacy of the ruling autocracy over many years; a devastating military rout in World War One followed by massed foreign invasion; an economic crisis so severe that the rouble crash of 1998 seems like a blip by comparison; the disintegration of a multi-ethnic empire; and the eruption of civil wars that dragged into the 1920s and claimed millions of lives. Never say 'never', but it is exceedingly difficult to imagine circumstances of such magnitude plausibly coming together in Russia in the foreseeable future.

Similarly, the Soviet Union collapsed because of a precise congregation of historical and circumstantial factors. These included: the gradual atrophy of the communist political and economic system over several decades; a specific ethno-federal constitutional arrangement, which incubated a nationalist mobilisation that divided Soviet elites against each other;²⁹ and an unusual confluence of events in the late 1980s (e.g. Gorbachev's political reforms,³⁰ which inadvertently broke the back of the CPSU, and steeply falling oil prices). In short, this example too is of limited relevance.

It is just about conceivable that Variant I ('enforced leadership change and a post-Putin leadership succession') might set in train a sequence of events that *eventually* culminated in an outcome akin to Variant III ('the breakdown of central State institutions and/or the Russian Federation'), perhaps via something like Variant II ('a weakening of the central authorities leading to a significant and lasting dysfunctionality of State institutions'). But the relationship between Variants I and III would be tenuous, highly convoluted and exceptionally contingent. In the meantime, countless other variables and developments, many of them essentially unknowable, would almost certainly have to develop and interact with each other, often in unpredictable ways. It is a logical fallacy to suggest that regime change would ineluctably cause central State power to implode so spectacularly and with such destabilising consequences.³¹

²⁹ In particular, the constitutional structure of the Soviet Union contained the giant Russian Soviet Federative Socialist Republic (RSFSR). This was the titular homeland of most Russians, who were by far the largest national group in the USSR. Yeltsin's mobilisation of the RSFSR against the Soviet central authorities in 1990-1 was arguably the development that did most to destroy the USSR from within. By contrast, the Russian Federation is divided into 89 regional 'subjects' of differing constitutional status. This makes the emergence of 'dual power' much less likely in Ru.

³⁰ One of the lessons that political leaders in Russia (and in other authoritarian post-Soviet countries) draw from the experience of the Gorbachev era is the critical importance of not relaxing political controls when confronted by domestic problems.

³¹ At the same time, we should not underestimate the degree to which State institutions in Russia have degraded over the past 25 years through corruption and misrule. The performance of the army in Ukraine in 2022 took many by surprise, both in Russia and the West.

Conclusions

Putin's departure from office would lead to heightened political uncertainty. This is inherent in Russia's system of governance, which lacks an institutionalised mechanism for leadership succession and is built upon the 'network State' – the opaque intertwining of formal institutions and informal patron-client networks. Overlaying these characteristics is Putin's personal domination of this system since the early 2000s; his sudden departure would add to the uncertainty.

Uncertainty is not, however, the same as instability. It is possible that leadership change might trigger a series of events that did indeed eventually lead to instability, perhaps if there was a contested succession and/or a contested process of leadership consolidation. Yet there would be nothing inevitable about this. It is just as plausible, arguably even more so, that Russia's elites would find ways to navigate the leadership succession in an orderly fashion and that Putin's successor would go on to consolidate his domestic position.

Even if a change of leader did open the door to crisis and instability, Russia would not necessarily experience 'a weakening of the central authorities leading to a significant and lasting dysfunctionality of State institutions', let alone the 'breakdown of central State institutions and/or the Russian Federation'. Outcomes would be highly contingent at every stage, shaped by fluid and complex combinations of variables. There would be multiple forks in the road as events evolved – and, accordingly, multiple opportunities for Russia's elites (and society) to act to avoid sliding down the 'slippery slope' to disaster.

END OF REPORT

The information and opinions expressed in this document constitute a judgment as at the date of the document and are subject to change without notice. The information and opinions expressed in this document have been formed in good faith on the basis of the best information and intelligence available at the time of writing, but no representation or warranty, express or implied, is made as to its accuracy, completeness or correctness. Earendel Associates Ltd accepts no liability arising out of or in connection with the comments made or the information set out in this document and you are advised that any decision taken to act or not to act in reliance on this document is taken solely at your own risk.

