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Glyn Ford

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ARTICLE COMMENTARY

DPRK, YESTERDAY, TODAY AND TOMORROW*

GLYN FORD

Glyn Ford was a Member of European Parliament for 25 years. He served on the Foreign Affairs and International Trade Committees as well as on the Delegations with Japan and the Korean Peninsula. Before becoming an MEP, he was a visiting professor at the University of Tokyo. He is the author of *North Korea on the Brink* (2008), *Talking to North Korea* (2018) and *Picturing the DPRK* (2023). Email: glynford@track2asia.eu

Introduction

The founding leader of the Democratic People's Republic of Korea (DPRK), Kim Il Sung, spent almost forty years successfully playing off Moscow and Beijing against each other; his see-saw politics delivered grants, loans, and asymmetrical countertrading between Pyongyang and the two rivals. But then, with the collapse of the Soviet empire at the dawn of the 1990s, there was just one partner to play with. Trade with Russia all but vanished and Beijing took advantage, demanding payment for its exports in hard currency.

Kim was forced to reset North Korea's prime objectives. First, with no-one to be trusted, there was a need for an independent security capacity, one that should include a nuclear capability, and second – seemingly at odds with the first – Pyongyang should normalise relations with the global hegemon, the United States. After Kim's death in 1994, these two policies were followed by his son, Kim Jong Il, and then, after 2011, by his grandson, Kim Jong Un. Increasingly, from a realistic security standpoint, going nuclear became key.

This thirty-year long chapter in the North's history has now closed because – from Pyongyang's perspective – the imperative to normalise

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relations with Washington has disappeared. First, the US has demonstrated its military and political impotence. The chaotic military exodus from Afghanistan in 2021, coupled with Washington's current inability to control its friends in Israel with respect to Gaza and its foes in Russia over Ukraine are seen in Pyongyang as three strikes against the US. Second, the fiasco of the Trump-Kim Summit in the Vietnamese capital Hanoi in February 2019, closed a last window of opportunity. Pyongyang had waited almost four decades to find an American president willing to engage but, when they finally did, he proved incapable of delivering.

US commentators claim the North is irrational, isolated, and unwilling to engage. All three accusations are wrong. Pyongyang, in its own terms, is as rational as the next man; maybe more so. While isolated from the West, it is not cut off from the rest. After Kim Jong Un's 2024 New Year's Address, in which Seoul was promoted to 'principal enemy', further engagement with the South was off the agenda. Equally, post-Hanoi, Pyongyang saw little point in talking to Washington with Biden's policy of 'malign neglect' now followed by a recycled Trump. But, to my knowledge, there were, in the last four years – before they threw their hand in with Russia, at least four attempts to engage with the European Union (EU), through efforts to restart the frozen Political and Human Rights Dialogues. It was Brussels that refused to talk, not Pyongyang.

Kim's two-fold challenge

The regime in Pyongyang faces two threats: internal and external. Internally, there will be no 'magnolia revolution' against the ruling Workers' Party of Korea, provided Kim keeps the people who matter happy. Fundamentally, these are the people who live in Pyongyang, now amply provided with 'bread and circuses'. The real internal threat is not popular revolt, but court squabbles among the '727 People'. Senior figures in the Party, military and ministries are allocated car number plates incorporating the number 727 – to commemorate the 'Victory in the Fatherland Liberation War': the signing of the armistice agreement on July 27, 1953. They are entirely safe from the traffic police, but not from their peers.

In terms of external security and the threat of induced regime change from abroad, Kim is acutely aware of Washington's broken promises and unilateral adventurism. During the 2000s, Pyongyang was encouraged to

follow the 'Libyan model' and give up its nuclear ambitions in exchange for being welcomed into the global community. But in the month before his father's sudden death, Kim Jong Un had the opportunity to view the brutal demise of the Libyan leader Muammar Gaddafi on live television. Equally, the lesson learned from the American-led invasion of Iraq in 2003 was that the problem was not *having* Weapons of Mass Destruction, but rather *not having* Weapons of Mass Destruction.

Pyongyang's nuclear weapons programme is a sign of *weakness* not *strength*. On the other side of the De-Militarised Zone, Seoul's military expenditure is currently eleven times greater than that of Pyongyang. This is a dramatic change; a quarter of a century ago the ratio was just three to one. The 10.3% increase in defence spending by Seoul in 2021 was bigger than the North's total military budget. If you add in the military budgets of Tokyo and Washington, the ravening threat is manifest: Pyongyang is outspent by a factor of 250. South Korea has a burgeoning defence industry manufacturing cheap 'American by design' weaponry good enough to be sold to several EU member states (replacing older generation equipment gifted to Ukraine). South Korea aims to be the world's fourth largest arms exporter by 2030.

Bread and circuses

Circuses are comparatively easy and cheap to put on. Authoritarian leisure has long been a regime priority under Kim Jong Un. The last fifteen years has seen Pyongyang scattered with fairgrounds, waterparks, skateparks, a dolphinarium, a horse-riding centre, and interactive science and natural history museums. Geography is not entirely kind, meaning the important people of Pyongyang have to travel to the Masikryong Ski Resort and take their package holidays on Mount Kumgang or at the beachside Wonsan-Kalma Resort, recently described by the BBC as "North Korea's Benidorm". Faint reflections of such pleasures, albeit cheaper versions, are increasingly to be found in provincial cities.

Maintaining living standards requires economic growth. The North is no developing economy, but rather a failed industrial state. One illustration here is the industrialisation of agriculture and the perils it brought. As rural labour was inducted into the country's factories, agricultural production was maintained and augmented by (1) electrification (2) mechanisation (3) irrigation and (4) fertilisation. All four depended on the availability of increased energy supply. In the early to mid-nineties, the conjuncture of the Soviet Union's collapse, Beijing's demands for hard

currency in exchange for oil, and the flooding of many of the North's coal mines, meant those energy demands could no longer be met. The result was a rapid collapse in agricultural production and the malnutrition and starvation of the decade-long 'Arduous March' that brought early deaths to millions and stunting to millions more growing bodies.

One consequence was the imperative of market reform, resented but inescapable for Kim Jong Il but more welcomed by Kim Jong Un. This was never going to be the introduction of free-wheeling capitalism. Rather, this was capitalism with Northeast Asian characteristics: the capitalism of China's state-owned enterprises, Japan's *zaibatsu* and the South's *chaebol*. Air Koryo, the DPRK's state airline, has expanded from planes to taxis and from in-flight catering to foodstuffs. The traders of the previously named Tong-il Market and the like are tolerated if they survive, but less so if they thrive. Nouveau-riche masterless traders *Ronin* are seen as a threat to the system. Instead, the favoured model is public-private partnerships, where small groups moonlight in the market under the shelter of military, ministry and party units.

In non-military factories there have been attempts to give a degree of freedom to production with the adoption of the 'Taen Work System Plus', where Enterprise Party Units use the craft knowledge of skilled workers to improve process and product. This is, in a way, a 'lite' version of workers' control and has parallels with elements of the Alternative Corporate Plan produced by trade unionists at the British company Lucas Aerospace during the mid-1970s. But they are beset by the same two choke points that blight the whole economy: energy, and manpower.

Energy & manpower

Potentially, these two bottlenecks could be alleviated, if not resolved, by the North's nuclear programme. Energy shortages could be ended by a civil nuclear power programme. Here in particular Pyongyang wants to be autarkic. This is why Kim, at the summit with Donald Trump in Hanoi, was prepared to give up the whole Yongbyon nuclear facility, but not to surrender the country's second uranium enrichment plant. The roots of the failure of the Hanoi Summit go back to the statement at the end of the previous Trump-Kim summit in Singapore the year before, in which the two committed to denuclearise *the whole Korean Peninsula*. As there was no likelihood of Seoul abandoning its own civilian nuclear power programme, Pyongyang took this as licence to develop its own equivalent – powered by indigenous enriched uranium. But Trump's

successor, Joe Biden killed off all hope of his engagement with the North when he seemingly carelessly changed the language. Knowingly or not, references to denuclearising North Korea, rather than the Korean Peninsula, were seen in Pyongyang as Washington, again, acting in bad faith.

For manpower, a similar logic applies, but this time with respect to the military programme. As a developed country there remains no pool of rural labour available to be pressed from field to factory. But an effective nuclear deterrent means Kim can substantially reduce the size of his conventional forces. With an army of around 1.4 million and a ten-year conscription period, a reduction of military service by twelve months would free more than 100,000 men for the industrial workforce. The leadership in the North has a very outdated image of industrial society, one in which thousands of workers toil in huge manufacturing plants. Here, however, it just might work to a degree. While the world is awash with cheap labour, what is unique in the North is that labour is both cheap and skilled. I've seen the factories in Rason churning out NBA basketball shirts with their 'Made in China' labels, as the Chinese find it cheaper to sub-contract the work than to do it at home.

Missiles and bombs

The North unquestionably has a functioning atomic bomb, although there is no solid evidence of either miniaturisation – necessary if the North wants to deploy Multiple Independent Re-entry Vehicles (MIRV) in its launch payloads – or the development of a hydrogen bomb. Its last nuclear test, in September 2017, was the largest to date and might have been a hydrogen device. If so, it was not an unqualified success. Any future test is likely to be better.

In terms of missiles, they have well-tested and matured technology behind their short-range and intermediate-range ballistic missiles. This is *not* the case for their inter-continental ballistic missiles (ICBMs) where testing has been limited. While they almost certainly have the capability to crash an ICBM somewhere in the continental United States, they have neither the payload capacity for MIRVs, nor a guidance system that would enable them to target Washington and not hit, say, Baltimore, nor the re-entry capability for the armed missile. Nonetheless, the current capabilities of the North and its direction of travel does, however, pose a serious threat to the long-term viability of US extended deterrence covering Seoul or Tokyo.

Provocations versus provoking

Pyongyang is certainly capable of provocations, but Kim Jong Un can barely get out of bed in the morning before the accusations fly. What is forgotten is there is a preordained technological choreography that determines the why and when of missile and other testing. Kim can choose the 4th of July rather than the 1st or 5th, but unless he wants to sabotage his own programme these variable parameters are narrow.

Trying, trying and trying again

There have been multiple attempts over the past few decades to resolve the various crises, real and imaginary, on the Korean Peninsula. The best was the first, the Agreed Framework of 1993, and it's been downhill all the way since. The Agreed Framework was negotiated between Kim Il Sung and Bill Clinton with an assist from former president Jimmy Carter. This deal traded a moratorium on the North's nuclear activities in exchange for Washington facilitating the construction in the North of two 'Light Water Reactors'. The US – and the world – managed a near decade-long nuclear freeze for $4 billion, with the bill passed to South Korea, Japan, and the EU. The Agreement was wilfully murdered by President George Bush (the Elder) in 2002.

After this came the seemingly endless Six Party Talks orchestrated by Beijing that the North saw as deliberately wrecked by Tokyo over the abductees issue – the fate of 17 Japanese citizens kidnapped by agents of the North. Then there was the diversion of the senseless Leap Day Agreement on 2012, more an April Fool Joke than a deal, when Washington claimed Pyongyang was willing to concede as much, if not more, than had been in the Agreed Framework for less than 10% of the benefits.

Last, best opportunity

Back in 2017, in Trump's first year in the White House, the North carried out an impressive – if ultimately flawed – nuclear test and two ICBM launches demonstrating a missile system capable of reaching most of the continental United States. By early 2018, as tensions soared, Kim and Trump were trading barbs as to which had the bigger nuclear button. Pyongyang was determined not to reprise Iraq's mistaken procrastination. It prepared a pre-emptive strike to be triggered by any evacuation of US non-combatants from the South. The saving grace was buried in Kim's belligerent 2018 New Year's Address. In the text was an offer of the

North's participation in the Pyeongchang Winter Olympics. Consequently, North came South, tensions eased, and the Kim-Trump Singapore Summit was on.

It was in the aftermath of Singapore that opportunity knocked but nobody answered. Missed by the West, and most certainly by the US, was the detail in Kim's 2019 New Year's Address signalling that he was fully on board, ready and willing to deal in Trump's game. It was there for anyone with eyes to see, but whether it was a 'Nelsonian' eye in Washington was never clear. In twelve months, North Korean policy was seemingly stood on its head. The mass production of nuclear weapons of the year before was replaced with arms conversion as the defence industry turned to the production of farm machinery and construction equipment. Pyongyang was willing to neither make, test, or proliferate nuclear weapons. It was abandoning missile and technology sales, support for Syria and first use of nuclear weapons.

It was a *Life of Brian* (1979) moment. The answer in the film to the question, 'What did the Romans ever do for us?' was aqueducts, sanitation, roads, wine, canals, baths, and education. To the question 'What did Pyongyang ever offer us?' the answer was defence conversion, non-proliferation, and no first use of nuclear weapons.

This was the last best hope waiting to be seized. Hanoi in 2019 was the time and place. Forlornly, the two leaders talked past each other. Their thinking was incommensurable. With the North, you get what's printed on the box, nothing more, nothing less. For Kim, it was the grand opening of a new relationship and the start of a decades-long punctuated resolution of denuclearisation. It was intended to be the first step, not the last chance it proved, because for Trump it was to be a one-off smash and grab providing instant gratification at the cheapest price.

Kim was not asking for all sanctions to be lifted. He barely seemed to be seeking the lifting of US sanctions at all, at least at this stage. He was all too aware that the lifting of these, or a US-DPRK Peace Treaty, would not pass the US Congress. Rather, he sought Trump's practical support for the lifting of the last rounds of UN sanctions with – if required – 'snapback' to make a real difference. He was clear about what he didn't want: the value of a signed Presidential letter wasn't worth the price of the paper it was written on. Afterall, the Agreed Framework had been unilaterally abandoned by Bush at the drop of the 'Axis of Evil' soundbite.

In contrast, Kim favoured something modelled on the Joint Comprehensive Plan of Action (JCPOA) with Iran. While there was no deal without Washington, there was equally no deal without money. Trump was both unwilling and, frankly, unable to deliver billions to Pyongyang from the US budget. Thus, the JCPOA model would serve the purpose of corralling the 'cash cows' in the operation. With the Iran deal, the UN Security Council's Permanent Five – US, China, Russia, UK and France – plus Germany and the EU – had endorsed and guaranteed the agreement. Transposed to the Peninsula, Germany would be replaced by Seoul and Tokyo, and these eight would provide security guarantees to the North, while the financial heavy lifting would fall almost exclusively to Seoul, Tokyo and, to a lesser extent, Brussels – as with the Agreed Framework in the 1990's.

The sum being sought by the North, allowing for the $4.5 billion offered as part of the Agreed Framework a quarter of a century before (plus inflation), and allowing for the fact Pyongyang was being asked to give up its nuclear weapons rather than merely cease development, would have been somewhere north of $25 billion. For Pyongyang, it would be spun as reparations, for the rest a generous industry fund – possibly to develop rare earth mining among other things, plus humanitarian assistance, and development aid.

Trump walks

Trump's walkout at Hanoi permanently ended any prospect of North Korean denuclearisation. The pro-engagement voices in the International Department of the Workers' Party and the Ministry of Foreign Affairs were brutally dismissed. In the room with Trump was Ri Su Yong, Member of the Executive of the Politburo and International Secretary of the Party. He was retired. Foreign Minister Ri Yong Ho faced rural exile or worse, while the ultimate and only survivor, then Vice-Foreign Minister Madam Choi Son Hui, spent several years in limbo being re-educated at the Party School before her resurrection as Foreign Minister. The pro-engagement fraction in Pyongyang no longer exists, it was driven into extinction. In the Party, the International Secretary's role – after a brief interregnum with a Russian specialist – is now in the hands of Kim Song Nam, a China hand without the heft that came with Ri Su Yong's Politburo rank.

Pyongyang thought they'd finally found in Trump an American president willing and able to deliver. The conclusion after Hanoi was that Trump, while willing to engage, was incapable of delivering. It was the sabotage of

the subalterns. The 'deep state' with the likes of John Bolton and Mike Pompeo had Trump like a puppet on a string. This, coupled with America's retreat from Afghanistan, the dithering and buck-passing over Ukraine, and its impotence over Gaza, saw a total foreign policy re-set in the North resulting in the current partnership with Moscow and the turning of its back on Seoul.

The second cold coming

The events in Hanoi demonstrated to Kim's satisfaction that normalising relations with Washington, on the basis of a deal on the Peninsula, was impossible. Subsequent events conveniently demonstrated it was unnecessary. The wish may have been father to the thought, but Pyongyang is increasingly far from alone in drawing that conclusion. Kim's 2024 New Year's Address was the public statement of private thinking. Unification was off the agenda; Seoul was now the North's principal enemy and Pyongyang would – like Seoul had done previously – unilaterally set its maritime boundaries.

Ri Su Yong had long argued in private that early North–South unification could only end with assimilation because of the economic chasm between the two. The reason for the disparity was the hostile policy of the United States and seventy years of increasingly crippling sanctions. With those two burdens lifted, the North was perfectly capable, like the other Asian Tigers, of delivering year on year growth of 10–15%. On that basis, within a couple of generations the two would be back in the same economic league with the possibility of unification without assimilation.

To explain Seoul's elevation to 'principal enemy', it is necessary to 'follow the money' and the order of battle. First, the promised game-changing investments from Seoul never materialised – partly because of worries of social consequences in the North. The Kaesong Industrial Complex, just north of the De-Militarised Zone, was never more than a pale shadow of its promise, and a political football in the South's domestic game. This undercut the economic rationale for engagement. Second, the North's new order of battle has the use of nuclear weapons early in any serious engagement. The ladder of escalation has very few rungs and pre-emption is the preferred option.

Until recently, the citizens of the South have been portrayed in the North as misguided, misled, and oppressed. This doesn't mesh with the prospect

of nuclear exchanges. In the Korean War following the initial capture of Seoul in 1950, the North was able to apply closely targeted oppression – as described in John Riley and Wilbur Schramm's *The Reds Take a City* (1951). Such sorting and winnowing just isn't possible with the bluntness of nuclear war and therefore Pyongyang's narrative will change to reflect that new reality. In recent Northern rhetoric, the fools in the South have metamorphosed into knaves.

As for the maritime boundaries on the west coast, these were arbitrarily determined by Seoul, with even Washington sceptical of their validity. This jarring inconsistency has been tolerated to a degree with the prospects of unification offering to nullify the problem. Once that is removed, Pyongyang has a strong case to ask for much more. A Law of the Sea demarcation line would cede to the North hundreds of square kilometres of additional waters with rich fishing, but in the current geopolitical climate that's not going to happen, particularly with Washington not having ratified the UN Convention on the Law of the Sea. Any unscripted change to the South's Northern Limit Line would force even a progressive regime to respond.

What is to be done and where do we go from here?

With Trump 2.0 in the White House in Washington and a new progressive President, Lee Jae-myung, in the Blue House in Seoul there are possibly more threats than opportunities. Last time around, Trump was demanding Seoul increase its funding of the Special Measures Agreement (the framework for the South's contributions to the costs of US forces based in the country) from around $1 billion to closer to $10 billion per annum; but was frustrated by his defeat by Joe Biden in the 2020 Presidential Election. Trump argued that the 'Miracle on the Han River' was only possible under the US nuclear umbrella. He sought both the full cost of US troop deployment in the South and 'compensation' for the historical economic losses incurred by American business. More recently Trump proposed that Seoul sign over to the United States ownership the land currently leased from the South Korean government. This would be a generous gift: the land in question is worth well over $120 billion.

If he seriously revisits that demand again, with the implicit threat of weakening US military support on the Peninsula, there is a real prospect that with the strong public support that exists for it in the South, Seoul would itself choose to develop nuclear weapons. Interestingly Pyongyang

would be fully in favour of this, apparently proving its point about their need for nuclear deterrence and the dual standards applied to them by the West compared to India, Pakistan, and Israel.

This would have regional and global consequences. Japan, and possibly Taiwan, would follow Seoul's lead, destroying what's left of the Non-Proliferation Treaty. China would consider imposing sanctions on Seoul, and the US would consider troop withdrawals. A problem for the South would be the potential security credibility gap. From the announcement of a unilateral nuclear programme to weapons deployment, even with the best will in the world, there would be a three-to-five-year hiatus despite early buttressing of the non-nuclear part of the programme where, absent the US nuclear umbrella, the North could threaten to rain bombs on the South while Seoul was limited to conventional responses.

Russian adventures

To date, Kim's pivot to Moscow has been a massive success. The 10,000 troops who fought against Ukrainian forces occupying the Russian region of Kursk are now battle-hardened and have learnt, sometimes painfully, the lessons of modern trench warfare with drones. The North has opened new sources of revenue selling its munitions to Moscow and benefitted from hard and soft technology transfer in the military and nuclear fields. Casualties among North Korea's troops have been comparatively high, but this is a country schooled on the battlefields of the Korean War, where mass casualties were the norm. The losses do not pose any threat to the regime. At the same time, the Russian venture has given Kim the opportunity to put more distance between himself and Beijing and, therefore, given Pyongyang a degree of independence missing for so long.

Will Kim come back to the table?

At a purely pragmatic level, there is absolutely no reason for Kim to court a second Hanoi humiliation. Once bitten twice shy. At the UN, he has Moscow and Beijing to veto further US manoeuvres to increase the pressure upon his regime. The Chinese leadership is concerned about the South going nuclear – because of the potential knock-on to Taiwan – and so may use its weakened influence to persuade Kim back to the table. Nevertheless, the door to denuclearisation is firmly closed.

For the moment, the North is refusing to engage with the US: even Trump's missives to Kim are refused in New York. Yet, while the US is regularly castigated by the North, Trump himself has been left well alone. Thus, Kim might just be seduced by the theatre of being global centre-stage with Trump once again. But if they do meet, this time Kim will be on a hair-trigger to walk first. An optimist could argue that, if the two do re-engage, there is a narrow path to success. It is just possible that Pyongyang might, with some delicacy and some difficulty regarding Seoul, sign-off on a multilateral deal offering arms control in exchange for massive industrial funding over a decade and more. Trump's obsession with the Nobel Peace Prize may well lead him to concessions and a deal he might not otherwise make.

Constructing a deal where both can credibly claim a clear win will be a challenge but it's just possible – at a considerable cost, not so much to the US and DPRK, but to friends and neighbours who will suffer serious collateral damage. Both Washington and Pyongyang would need to collude to save face. An undated promise for future denuclearisation talks, to take place well after Trump's term ends, could help Washington while, for the moment, protecting Pyongyang's nuclear weapons under a political mortsafe, while Kim glibly announces that the North has completed all necessary nuclear and ICBM testing and is henceforth moving from development to production. Thus, Trump gets to make America safe again. An end to ICBM testing, combined with the possibility of the North's paths to both a hydrogen bomb and warhead miniaturisation, leave Kim a serious and dangerous threat to Seoul and Tokyo, but not to Washington.

In sum, Kim gets the *de facto* recognition of the North as a nuclear power, a partial lifting of UN sanctions, normalisation of relations with Washington, massive industrial investments in rare earth mining (that will help break Beijing's quasi-monopoly) and either the creation of a triad of new see-saw relations between Moscow, Washington and Beijing or the incorporation of the North into a simple 'reverse Nixon' when the fighting in Ukraine ends.

Unintended consequences

A deal that protects the United States at the price of leaving its Japanese and South Korean allies exposed would leave Washington with a powerful hand. The nuclear umbrella over Northeast Asia can be furled at little cost

to the US, while Seoul – and Tokyo – will be over a barrel with negotiations to extend the Special Measures Agreement. Seoul, Tokyo, and Taipei may choose to go nuclear, but too late to make a difference. But the very prospect of such a deal and its unreeling creates serious problems for China's president Xi Jinping, alongside those facing Seoul's President Lee Jae-myung and Tokyo's Prime Minister. A nuclear Taiwan would be an anathema and nightmare for Beijing, while the undermining of its quasi-monopoly on rare earths would weaken its leverage in trade negotiations with the developed world. This will run and run. It may well be the perfect case of 'Be careful what you wish for, lest it come true'. In retrospect, it might seem that the current crisis was more manageable than the ones that follow its resolution.

Disclosure statement

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ORCID

Glyn Ford http://orcid.org/0009-0007-6797-903X