

# DEFINE OUR FUTURE

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Space Industry News Roundup and Analysing Efforts to 'Protect the Dark and Quiet Skies'

# CONTENTS

## 3. NEWS ANALYSIS

|                                |    |
|--------------------------------|----|
| Moon .....                     | 03 |
| Launch .....                   | 04 |
| Orbit .....                    | 06 |
| Business and the Economy ..... | 06 |

## 8. SPACE LAW REVIEW

|                                                                                                              |    |
|--------------------------------------------------------------------------------------------------------------|----|
| Protecting the Dark and Quiet Skies: Can Law<br>Protect the Skies from Increasing Satellite Pollution? ..... | 08 |
| The Hard Law Provisions: How do the<br>Treaties Protect the Night Sky (or not) .....                         | 09 |
| The Dark and Quiet Sky Initiative .....                                                                      | 11 |
| References .....                                                                                             | 13 |

## 15. IMPRESSUM

# NEWS ANALYSIS



AI NEWS

OPINION | ANALYSIS

## Space Industry Roundup: Infrastructure, Competition and a Maturing Market.

(Image: Adobe)

The space sector this month is characterised by a deepening of infrastructure ambition across every major domain. On the Moon, the architecture of permanent presence is taking shape through a combination of NASA programme decisions, ESA contract awards and commercial partnerships. In launch, a new cohort of vehicles from multiple continents is pushing toward orbit, while the economics of space access continue their downward trajectory. And in the broader commercial and business landscape, the space economy is attracting capital, regulatory attention and new industrial entrants at a pace that would have been difficult to imagine even five years ago.

### Moon

The lunar programme landscape has seen a significant restructuring this month, with NASA simultaneously advancing some elements of its architecture while stepping back from others. The agency has confirmed that Artemis III remains on track despite a setback affecting Blue Origin, for which NASA is providing an alternative testing pathway for its New Glenn upper stage, an important signal of commitment to the mission timeline even as individual

contractor milestones slip. Separately, however, NASA has cancelled a \$73 million lunar lander mission with contractor Draper, a reminder that the expansion of commercial lunar programmes is accompanied by the inevitable reality of attrition as the agency concentrates resources on the most critical near-term deliverables.

The broader lunar mission portfolio continues to expand. Firefly Aerospace has been awarded a new NASA CLPS contract, deepening its role in the commercial lunar delivery architecture. NASA has also tapped Advanced Space for the CAPSTONE 02 lunar mission, building on the original CAPSTONE pathfinder which validated the near-rectilinear halo orbit intended for the Lunar Gateway before its cancellation. On the European side, ispace-EUROPE has secured a €65 million contract from ESA and has been awarded the contract to execute MAGPIE, ESA's first lunar rover mission, a significant milestone for the Luxembourg-based commercial lunar company.

Lunar Outpost Europe has joined ESA's Moonraker lunar mapping mission, while MDA Space UK has been selected by OHB to provide advanced landing sensors for ESA's Argonaut cargo lander, reflecting the increasingly international character of Europe's lunar supply chain. Japan's ispace is also broadening its ambitions beyond lander operations, with the company expanding into lunar infrastructure more generally and confirming that its Mission 3 ULTRA lunar lander will launch aboard Mitsubishi Heavy Industries' H3 rocket, marking the first Japanese lunar landing mission to be launched by a Japanese rocket. The milestone carries symbolic weight for Japan's space sector, as it demonstrates the convergence of domestic launch and lunar exploration capability within a single national mission architecture.

## Launch

The global launch landscape is undergoing a period of remarkable expansion, with new vehicles, new launch sites and new national entrants all advancing simultaneously. The economics of space access are shifting too: a study published this month projects that space cargo costs could fall by more than 90 percent by 2040, a figure which, if borne out, would be transformative for the commercial viability of in-space manufacturing, resource extraction and long-duration surface operations. In Europe, two significant developments signal the continent's determination to build credible sovereign launch capability. RFA ONE, the rocket developed by Rocket Factory Augsburg, is targeting this year for what would be the UK's first orbital launch, following a turbopump explosion that delayed earlier attempts. Isar Aerospace, meanwhile, has signed a \$112.5 million deal for a launch pad in Nova Scotia, securing Canadian infrastructure for its Spectrum rocket as the company prepares for its first orbital attempt. Germany is also reported to be considering the development of a dedicated military

space launch site, with defence minister Pistorius indicating that the government is actively assessing the option, a development that reflects the growing recognition across European defence establishments that sovereign launch capability has strategic as well as commercial value.



RFA One Rocket (Image: RFA)

**RFA Still Target 2026 for  
Debut Launch from  
Saxavord, Scotland.**

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Rocket Lab has secured a \$266 million Space Force deal to open a new launch site in Alaska, expanding its launch network and its positioning as a responsive launch provider for national security missions. The deal follows the company's record-breaking VICTUS HAZE launch reported last month defence space enterprise, and reinforces Rocket Lab's status as a key partner for the US.

China has successfully recovered the Long March 10B rocket following its maiden flight, marking a breakthrough in reusability for the heavy-lift vehicle that will play a central role in the country's crewed lunar programme. CAS Space is advancing its own reusable rocket technology, with the Lihong-2 scheduled for its maiden flight before the end of the year. Japan's space agency has conducted the first test flight of an experimental reusable rocket, a significant step for JAXA as it develops next-generation launch capabilities. India's Skyroot Aerospace has reached orbit with its Vikram-1 rocket, a milestone for India's commercial launch sector and a further demonstration of the broadening geographic base of global orbital launch capability. A private rocket has also been launched for the first time from the East China Sea, reflecting China's continued expansion of launch infrastructure and approaches.

Within the launch segment but with implications across the broader lunar economy, Interlune has developed cryogenic technology to expand the supply of helium-3 for quantum

computing applications, and has expanded its strategic partnership with Vermeer to build essential Moon base infrastructure. The convergence of terrestrial quantum computing demand with lunar resource extraction capability is an increasingly important economic narrative within the lunar sector, providing a near-term commercial pull for technologies whose space applications will take longer to mature.

## **Orbit**

The satellite sector continues to expand, with both new constellation ambitions and new service models emerging. Germany has announced plans to develop its own version of Starlink, targeting a constellation of no fewer than 1, 200 satellites by 2030, a significant sovereign communications initiative that reflects the broader European push for strategic autonomy in critical space-based services. Amazon Leo has sought FCC approval to launch 5,105 satellites for mobile device connectivity, advancing its Kuiper programme's direct-to-device ambitions in competition with SpaceX's Starlink and the Amazon-acquired Globalstar network. Poland has committed over €650 million to the European IRIS2 satellite system, adding to the list of European nations making substantial investments in shared connectivity infrastructure.

A private mission has launched to extend the operational life of out-of-gas communication satellites, the latest demonstration of the commercial viability of in-orbit servicing as an industry. As the satellite population grows and the costs of replacement remain high demand for life extension services is likely to increase, and the commercial model for such missions is beginning to prove itself in practice. ESA's exploration of a blockchain and AI-enabled satellite communications deal with Keysight Technologies points to the growing sophistication of the technology layer being embedded in satellite networks, as operators seek to add intelligence and flexibility to their infrastructure.

## **Business and the Economy**

The space economy's expanding footprint is attracting attention. Taiwan is ramping up its space industry push, with the government signalling a broader ambition to position the island as a significant player in the global space supply chain, building on its already considerable semiconductor expertise. India is moving toward flying space rockets on indigenous chips, with domestically produced semiconductors expected to feature in future launch vehicles, a development that reflects the country's broader technology self-sufficiency agenda and has implications for the resilience of its space programme.

The Exploration Company, the European in-space logistics startup, is reported to be in talks to raise \$300 million at a \$2 billion valuation, a figure that would represent a significant step up in the company's capitalisation as it prepares for operational missions and the development of a reusable heavy-lift rocket. Astroscale has taken a co-chair role in the UK Space Security Hub, reflecting the company's growing influence in the space sustainability and domain awareness policy landscape, and the increasing integration of commercial operators into national security space governance structures.

The asteroid mining market is also receiving renewed attention, with projections suggesting it could grow severalfold in the coming decades as prospecting technologies mature and the regulatory framework for space resource extraction develops. The UAE, meanwhile, has announced a 90-day grace period for space sector firms to regularise their operations under the country's evolving space regulatory framework, a measure that reflects both the rapid growth of the UAE's commercial space sector and the challenge of keeping pace with it through regulation.

China's lunar programme continues to advance on multiple fronts. Among the more striking proposals to emerge this month is a concept for lunar laser towers capable of beaming wireless power across the surface, a technology that, if validated, could address one of the most fundamental constraints on sustained lunar operations: reliable energy supply in areas not continuously illuminated by the sun. It is an ambitious concept, but consistent with China's broader approach of pushing at the boundaries of what is technically achievable in support of its International Lunar Research Station programme.

The scientific and programmatic discussion around the Moon's future is also evolving. An Artemis 2 astronaut has publicly advocated for equatorial lunar landings in future missions, a position that reflects the tension within NASA's programme between the resource-rich but operationally challenging South Pole, which is the current focus, and more accessible equatorial regions that may offer different scientific and logistical advantages. It is a debate that is likely to intensify as the programme matures and the trade-offs between different surface regions become clearer. Looking further ahead, NASA has released an estimate of \$2.1 billion for a nuclear-powered Mars mission, providing the first substantive cost framing for what remains one of the most technically and financially demanding proposals on the agency's horizon.

# SPACE LAW REVIEW



## SPACE LAW & POLICY

### SUSTAINABLE & PEACEFUL USES OF OUTER SPACE

Discussing the challenges, threats and opportunities to international space law and governance, arising out of evolving international relations, geopolitical dynamics and more.

(Image: Unsplash)

Key terms: Dark and Quiet Skies; COPUOS; STSC; LSC; UNOOSA; Outer Space Treaty; LTS Guidelines; Orbital Data Centres; Megaconstellations.

## Protecting the Dark and Quiet Skies: Can Law Protect the Skies from Increasing Satellite Pollution?

In recent months, there has been an increase in the interest in utilising low-Earth orbit (LEO) for the placement of Orbital Data Centres (ODC), adding to the overall rapid growth of the orbital population. In addition to the over 16,000 active satellites currently in orbit, and the 140 million pieces of small space debris, planned and recently announced projects will significantly increase these numbers. This includes Los Angeles-based company 'Orbital', which announced in June that it will aim to launch '...100,000 satellites designed to run artificial-intelligence workloads in space...', with a demonstration mission planned for 2027. Additionally, StarCloud have applied to the Federal Communications Commission (FCC) to deploy an 88,000 ODC constellation, putting it '...in the same numerical tier as the largest proposed Starlink and Amazon Kuiper expansions', while Blue Origin has established its 'Project Sunrise', and SpaceX has announced a project to launch 1 million AI ODCs.

The potential benefits of placing data centres in orbit include seamless solar power supply, no reliance on water and local power sources, cooling benefits of the space environment, and reducing the growing environmental and infrastructure pressures of Earth-based computing. There are also challenges regarding the efficacy of OCDs, such as how to radiate the immense heat generated by the data centre (which would require massive radiators to do so), exposure to space radiation, and the sustainability and security challenges posed by a rapidly increasing orbital population. However, this article does not seek to understand the opportunities and challenges of OCDs, but to understand how the ongoing growth of satellite mega-constellations impacts the night sky.

Very large satellite constellations can cause a range of problems, including interference with astronomical research, characterising dangerous near-Earth objects, and reflected sunlight from orbiting satellites. It also affects ‘...the general connection between humanity and the night sky, including for Indigenous communities.’ This paper therefore seeks to understand what legal and governance measures are in place, or are being explored, to protect the night skies in the wake of rapidly growing mega-constellations.

## **The Hard Law Provisions: How do the Treaties Protect the Night Sky (or not)**

In his seminal 17th-century writings, Hugo Grotius declared that ‘Every nation is free to travel to every other nation, and to trade with it’, establishing an international custom of freedom of the high seas’, a freedom which was then first regulated in treaty form in the 1958 High Seas Convention, stating that ‘The high seas being open to all nations, no State may validly purport to subject any part of them to its sovereignty.’ In the year before the Convention was adopted, the Soviet Union launched the first human-made object into orbit: Sputnik-1. Despite concerns about the spread of hysteria and alarm, and the living threat of the placement of nuclear weapons in space, President Eisenhower remarked that ‘...the Russians had in fact done us (the US) a good turn, unintentionally, in establishing the concept of freedom of international space...’

Consequently, a series of UN General Assembly (UNGA) Resolutions established the founding principles of international space law, founded the Committee on the Peaceful Uses of Outer Space (COPUOS), and eventually codified these principles into the Outer Space Treaty (the ‘OST’), the ‘Magna Carta’ of space law. Article I of the OST states that:

“The exploration and use of outer space, including the moon and other celestial bodies, shall be carried out for the benefit and in the interests of all countries, irrespective of their degree of economic or scientific development, and shall be the province of all mankind.

Outer space, including the moon and other celestial bodies, shall be free for exploration and use by all States without discrimination of any kind, on a basis of equality and in accordance with international law, and there shall be free access to all areas of celestial bodies.

There shall be freedom of scientific investigation in outer space, including the moon and other celestial bodies, and States shall facilitate and encourage international co-operation in such investigation.”

The result is a binding principle of freedom of ‘use’, placed not only upon States, but also commercial actors, as written into Article VI, which permits such activity, as long as States provide authorisation and ongoing supervision of their activities. Therefore, acting within the remit of international law, commercial entities now dominate activities in Earth orbit. The number of objects launched annually into outer space has risen from 231 in 2015, to 4526 in 2025, with 3952 of those being commercial. Starlink itself now consists of over 11,000 satellites in LEO, making up the majority of the active satellites in orbit. Commercial spikes in activity over the past decade are underpinned by this given freedom of use, outlined in the OST.

However, this freedom is not unlimited, and the mass interference caused by satellite megaconstellations may contravene aspects of international law. OST Article I requires that the uses of outer space shall be for the ‘...benefit and in the interests of all countries’, and that there shall be freedom of scientific investigation. One must then consider if harmful interference caused by light and radio interference places a limit on that freedom. Furthermore, Article II provides the critical provision on non-appropriation, stating that:

“Outer space, including the moon and other celestial bodies, is not subject to national appropriation by claim of sovereignty, by means of use or occupation, or by any other means.”

Another argument could then be that placing such constellations creates a form of orbital appropriation through the long-term acquisition of orbital slots and frequencies. With Starlink dominating LEO, and more megaconstellations coming into fruition, this could represent a handful of companies effectively dominating Earth orbit to the detriment of others. Furthermore, OST Article IX creates a responsibility for States to prevent harmful interference, and to give ‘...due regard to the corresponding interests of all other States Parties to the Treaty.’ This could also then arguably be applied to those actors creating interference through light and radio interference, while the Constitution of the International

Telecommunications Union (ITU) calls on States to prevent harmful interference, and adds that:

"...States shall bear in mind that radio frequencies and any associated orbits, including the geostationary-satellite orbit, are limited natural resources and that they must be used rationally, efficiently and economically, in conformity with the provisions of the Radio Regulations, so that countries or groups of countries may have equitable access to those orbits and frequencies, taking into account the special needs of the developing countries and the geographical situation of particular countries."

Precedents and comparisons can also be found within the body of international law. A case brought before the International Court of Justice between Argentina and Uruguay in 2006 concerned the use of a river on their shared boundary, the Pulp Mills on the River Uruguay. In the case, 'Argentina charged Uruguay with having unilaterally authorized the construction of two pulp mills on the River Uruguay without complying with the obligatory prior notification and consultation...', required under the Statute of the River Uruguay. In the judgment, the court found that the Parties retained an obligation to continue their cooperation, and to '...devise the necessary means to promote the equitable utilisation of the river, while protecting its environment'. Applying this to the space domain would suggest that all Parties to the international treaties remain obliged to give due regard to the activities of others, which should include considerations for observation of the night sky.

However, interpretations of international law also provide legal justification for the actions of megaconstellation operators. OST Article I allows for free 'use' of outer space, while the ITU provides a regime for the registration and distribution of spectrum frequencies. Moreover, the ITU Radio Regulations require '...bringing into use of any frequency assignment to a space station of a satellite network or system shall be not later than seven years following the date of receipt by the Bureau..', preventing the de facto appropriation of frequencies, and hoarding of spectrum allocations. In addition, operators could argue that their services provide a 'benefit to humankind', which OST Article I again supports.

## **The Dark and Quiet Sky Initiative**

In December 2021, a working paper was put before the COPUOS Scientific and Technical Subcommittee (STSC), by Chile, Slovakia, Spain, the International Astronomical Union, the European Southern Observatory and the Square Kilometre Array Observatory, titled 'Protection of dark and quiet skies'. This noted that 'There are three categories of artificial

interference that negatively impact astronomical observations: (a) urban illumination or artificial light at night; (b) optical/infrared trails of the satellites in low Earth orbit; and (c) radio transmission by ground and space emitters, especially from the satellites in low Earth orbit.’ It continues to state that, though communications satellites, such as Starlink, are providing critical low-latency global services, ‘...large constellations of satellites present a new challenge to astronomy owing to their number, their brightness in the sky (due to optical reflections or thermal emission), their ubiquitous location in the sky (compared with satellites in geostationary orbit that are confined to a single “belt”) and their proximity (which is a driver of low latency).’

The paper furthermore requested that the STSC include a new agenda item titled ‘Impact of satellite constellations on astronomical facilities.’ In 2024, the STSC agreed to add “Dark and quiet skies, astronomy and large constellations: addressing emerging issues and challenges” on its provisional agenda for its sessions in 2025, 2026, 2027, 2028 and 2029 as a single issue/item for discussion.’ Within this item, there has since been suggestions by States to address the issue. The US Delegation observed the International Astronomical Union’s brightness recommendation of 7th magnitude, and encouraged engagement with satellite manufacturers is ‘...both useful and economical’, and that US manufacturers ‘...have worked diligently to test and implement changes including dielectric film, dark paint, visors, operational orientation modifications, bringing satellites to lower altitudes, and sharing high-precision telemetry.’ Brazil also highlighted the need for quiet skies to monitor threats from space weather, similar to the need for quiet skies to monitor threats posed by near-Earth objects, such as asteroids.

Brazil added that ‘...future revisions of the COPUOS Guidelines for the Long-term Sustainability (LTS) of Outer Space Activities should incorporate preserving Dark and Quiet Skies into its umbrella.’ The LTS Guidelines, adopted in 2019, provide a set of non-binding voluntary principles to guide operators and States on how to conduct activities sustainably, while the LTS Working Group (2.0) within the STSC seeks to discuss modes of compliance and enhancing the Guidelines. Additional provisions specifically regarding protection for space observation could then be a topic of further discussion.

As the the discussion on this subject continue through 2029, considerations will also need to be given to the exponential growth of satellite numbers, and increasing demand within the spheres of defence, communications, and commercialisation. Once again, lawmakers will need to strive to keep pace with with economic growth.



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