



WP4 – The Framings and Strategies of Cinema Professionals

Policy brief on perspectives of European and non-European cinema professionals

Project: Reviving, Boosting, Optimising and Transforming European Film Competitiveness - REBOOT

Grant Agreement: 101094796 - HORIZON-CL2-2022-HERITAGE-01

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Object D4.5 Policy brief on perspectives of European and non-European cinema professionals

WP	WP4
Deliverable Lead	ULIEGE
Type	R=report
Dissemination Level	PU= public
Version	1.0



Funded by the European Union

Metadata

Project	Reviving, Boosting, Optimising and Transforming European Film Competitiveness - REBOOT
Acronym	REBOOT
Programme	Horizon Europe
Call	HORIZON-CL2-2022-HERITAGE-01
Grant Agreement No.	101094796
Project coordinator	Katharine Sarikakis (UNIVIE)
Licensing terms	CC-BY 4.0
DOI	https://doi.org/10.5281/zenodo.17738095
Author(s)	Antonios Vlassis, Marina Rossato Fernandes, Mafalda Dâmaso
Reviewer(s)	Daniel Biltereyst (UGENT), Fernando Ramos Arenas (UCM), Tuuli Lähdesmäki (JYU) - reviewers of the reports D4.1 and D4.4.
Title	Policy brief on perspectives of European and non-European cinema professionals
Deliverable No.	D4.5
WP No.	4
Lead beneficiaries	ULIEGE
Contributing beneficiaries	EUR
Type	R - Document, report
Dissemination Level	Public
Version	1.0
Keywords	European Film Industry, competitiveness, international film market, Hollywood, VOD platforms
Language	English



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List of main abbreviations

AI	Artificial Intelligence
AVMSD	Audiovisual Media Services Directive
EFI	European Film Industry
EFP	European Film Promotion
EU	European Union
VOD	Video-on-Demand



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CONTEXT

The European Film Industry (EFI) operates in a rapidly evolving global audiovisual landscape marked by intensified competition, shifting circulation patterns, and structural asymmetries. Over the past decade, the international environment has been reshaped by the expansion of global Video-on-Demand (VOD) platforms, introducing new challenges for visibility, financing, and long-term sustainability of the industry. These developments have prompted the EU to place competitiveness at the centre of its audiovisual agenda. However, the notion of competitiveness remains contested, both in academic debates and in the lived reality of industry professionals. Addressing this gap requires a grounded understanding of how competitiveness, international market and the EFI are perceived and enacted by film professionals themselves. The two REBOOT reports: D4.1, examining European professionals' views, and D4.4, analysing how non-European professionals across six international markets understand the EFI, jointly respond to this need by providing robust, comparative evidence from both inside and outside Europe.

Across both reports, a shared finding emerges: competitiveness in the EFI cannot be narrowly reduced to economic performance or global market share. Instead, professionals consistently link the EFI's strength to its cultural diversity, public support systems, artistic freedom, and collaborative production model. These elements are perceived as defining features of Europe's distinct audiovisual identity and as essential assets in a global context increasingly shaped by commercial pressures. The research shows that while European films face structural challenges, including limited cross-border circulation and global visibility, professionals both inside and outside the EU attach significant symbolic and cultural value to the EFI. The public support, the tradition of international co-production, and the prominence of film festivals are recurrently recognised as central to Europe's international relevance.

At the same time, the findings confirm a widening mismatch between top-down institutional discourses on competitiveness, largely centred on growth, scale and market expansion, and the bottom-up perspectives of professionals who emphasise cultural, social, and political dimensions of the EFI. This gap has direct policy implications. When competitiveness frameworks privilege industrial metrics alone, they risk overlooking the core dimensions that underpin the EFI's resilience, such as cultural diversity, creative freedom, and collaboration. Both reports underscore that meaningful policy design must recognise these characteristics as a competitive advantage rather than an obstacle.

The international dimension constitutes another key area where challenges and opportunities intersect. D4.1 shows that, from a European perspective, the international market remains



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fragmented and difficult to navigate. Despite existing EU instruments, the circulation of European films continues to depend heavily on national contexts, festivals, co-production networks, and individual professional relationships. Structural barriers, such as linguistic fragmentation, uneven distribution infrastructure, and the dominance of US studios and platforms, continue to limit international reach. Co-production emerges as both a strategic tool and a necessity: it allows producers to pool resources, reduce risk, and expand distribution potential, but it also involves navigating heterogeneous regulatory systems and complex administrative processes.

D4.4 adds a crucial external perspective by analysing how film professionals in Argentina, Brazil, Mexico, South Africa, South Korea, and Türkiye understand the EFI and interact with European partners. For professionals across these regions, Europe is primarily associated with auteur cinema, cultural diversity, and robust public support structures. European film is widely perceived as artistically valuable but limited in mainstream visibility. Film festivals and cultural initiatives are the primary vehicles for circulation, while commercial access, especially in theatres, remains narrow. Importantly, the EFI is consistently viewed as a desirable partner for co-production and professional exchange, but European schemes are also criticised for being overly bureaucratic, inflexible, and insufficiently adapted to local production scales.

Both reports highlight a shifting geopolitical terrain. In several of the case-study countries, emerging actors such as China, Russia, and global VOD platforms have intensified their presence, competing for visibility and influence. This competition is particularly noticeable in South Africa and parts of Latin America, where European initiatives are valued but increasingly rivalled by new partners offering faster, less bureaucratic, or more financially attractive collaboration models. These findings reinforce the need for a renewed strategic approach to the EU's international audiovisual relations, one that is grounded in local needs, responsive to regional dynamics, and capable of supporting sustainable long-term partnerships. A separate policy brief makes recommendations to strengthen the overlap of such an approach to EU international audiovisual relations on the one hand with the EU's work on International Cultural Relations, which focuses on long-term trust building, on the other hand.

Additionally, the expansion of global VOD services introduces new asymmetries. Across Europe and in the six international markets, these platforms are described as “double-edged”: they increase access to production opportunities and global audiences but consolidate control over data, intellectual property, and discoverability, often in ways misaligned with long-term ecosystem development. Both reports highlight the need for shared solutions to address such asymmetries and,



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at the same time, strengthen sustainable partnerships between the EU and the six international markets.

Together, D4.1 and D4.4 fill a critical gap by bringing together European and international perspectives on competitiveness and the EFI's position in global markets. They demonstrate that the EFI remains a valued cultural and industrial partner across regions, yet its future competitiveness requires closer alignment between policy frameworks and bottom-up professional realities. The reports collectively call for renewed coordination in international promotion, more accessible and adaptive collaboration tools, and a broader definition of competitiveness that integrates cultural value, and fosters long-term sectoral resilience.

The policy proposals are organised around the following dimensions: co-productions, distribution, promotion and audience development, film festivals, VOD, and competitiveness.

METHODOLOGY

This policy brief draws on evidence generated within REBOOT Work Package 4, which examines how film professionals perceive the competitiveness of the European Film Industry (EFI) and its position in international markets. The analysis integrates findings from two complementary reports. D4.1 focuses on professionals working within the EU and builds on a mixed-method approach combining 37 in-depth semi-structured interviews, conducted online and in person between January and August 2024, with producers, distributors, VOD professionals, sales agents, public officials, and other industry stakeholders. These qualitative insights are complemented by a pan-European survey with 432 valid responses carried out between November 2024 and February 2025.

D4.4 extends this approach to non-European contexts by analysing how the EFI is perceived in six key international markets: Argentina, Brazil, Mexico, South Africa, South Korea, and Türkiye. The report is based on 99 semi-structured interviews with a wide range of professionals conducted between December 2023 and July 2025. It also includes an international survey with 425 valid responses, capturing comparative views on European cinema, co-production, distribution channels, and policy frameworks. Extensive desk research of academic, policy, and industrial sources further contextualised each national case study. Taken together, these two datasets provide a robust, practitioner-centred evidence base that allows for a multidimensional analysis of the EFI's strengths, weaknesses, and evolving position in global audiovisual markets.



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POLICY RECOMMENDATIONS

Strengthen and update co-production frameworks

Recommendation: The EU should modernise and expand its co-production frameworks to deepen collaboration with key international partners and reinforce the EFI's global presence. This includes updating existing co-production agreements and extending mechanisms to additional countries with demonstrated interest in working with European partners. Beyond formal agreements, the EU should prioritise building long-term professional networks by supporting sustained exchange platforms, talent development labs, and market linkages that connect European professionals with professionals outside the EU. Strengthening dissemination of information about EU co-production opportunities and investing in networking events targeted at non-EU professionals will further enhance visibility, foster trust, and facilitate the development of new collaborative projects.

Rationale: D4.4 shows that professionals value co-productions with Europe as essential pathways for accessing funding, international circulation, and creative exchange. At the same time, the findings highlight that formal co-production agreements alone are not sufficient: meaningful collaboration depends on ongoing contact, trust-building, and opportunities to develop shared projects over time. Professionals from outside the EU expressed strong interest in deeper engagement with Europe but pointed to gaps in networking, limited knowledge of European systems, insufficient opportunities for sustained professional interaction, and asymmetric frameworks. These insights complement D4.1, which emphasises that co-production reinforces EFI core strengths - cultural diversity, collaboration, and creative freedom - and remains a key tool for enhancing competitiveness beyond economic metrics. By expanding agreements, updating frameworks, and investing in structured and balanced networking across regions, the EU can support a more inclusive, future-oriented co-production ecosystem that strengthens European and international partnerships while reflecting the EFI's distinctive collaborative model.



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Strengthen support for local distributors, exhibition spaces, and audience development

Recommendation: The EU should reinforce and expand support measures for local distributors, cinema theatres, and exhibition spaces in non-EU markets to increase the circulation and visibility of European films. This includes offering targeted incentives for distributors willing to acquire and promote European titles, providing financial support for independent and arthouse cinemas that programme EU works, and reintroducing or scaling tools previously recognised as effective by professionals, such as Europa Cinema Mundus programme, which supported film programming between MEDIA and non-MEDIA member countries, or the MEDIA Mundus programme, which offered funding for distribution, promotion, and co-production with non-European countries (D4.4).

In parallel, the EU should invest in audience development initiatives, including public formation programmes, media literacy activities, and curated “European film cycles,” to encourage exposure to diverse cinematic languages and narrative traditions that define the EFI. These measures should be implemented in collaboration with European Film Promotion (EFP), EU Delegations, national cultural institutes, and local partners to ensure sustainable and context-specific impact.

Rationale: D4.1 highlights structural challenges in circulating European films outside EU borders. D4.4 confirms that professionals in Argentina, Brazil, Mexico, South Africa, South Korea, and Türkiye are willing and motivated to showcase European films, yet face concrete constraints: scarce exhibition spaces, highly concentrated distribution sectors, limited marketing resources, and fragile domestic circuits. Importantly, interviewees repeatedly noted that past EU support for distribution and exhibition was crucial in enabling them to take risks on European titles and broaden local audiences. Both reports emphasise the cultural importance of exposing audiences to the diversity, artistic freedom, and stylistic richness characteristic of the EFI. Investing in media literacy, public formation, and curated programming supports circulation and strengthens cultural relations and reinforces Europe’s distinctive value proposition.



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Protect territorial exclusivity as a cornerstone of the EFI

Recommendation: Maintain and reinforce the legal protection of territorial exclusivity, popularly known as geo-blocking, within the EU regulatory framework, recognising its essential role in the financing, distribution, and sustainability of the EFI. Any future revision of EU digital market regulations should explicitly safeguard geo-blocking for audiovisual works, ensuring that distributors and producers retain the ability to sell rights territory by territory and design staggered, context-specific release strategies.

Rationale: Findings from D4.1 show that professionals view the EFI as structurally dependent on territoriality. The report highlights that ongoing debates around digital integration and the push toward a borderless Digital Single Market have created uncertainty around the future of geo-blocking, raising concerns among professionals that the erosion of territoriality would harm the financial and organisational foundations of the EFI. The EFI is designed around territorial exclusivity: it is this system that enables producers and distributors, particularly SMEs and those operating in small-language markets, to secure financing, manage risk, and tailor circulation strategies to diverse cultural and market contexts. Professionals, therefore, underscore the need to preserve geo-blocking within broader digital policy discussions, emphasising that its removal would disproportionately harm independent productions.

Incentive for marketing, audience development initiatives

Recommendation: The EU should introduce targeted incentives to encourage producers, distributors, and sales agents to integrate marketing and audience development strategies from the earliest stages of project development. This should include dedicated funding lines for early-stage marketing design, support for audience research and testing, training programmes on strategic communication, and incentives for collaborations between creative teams and marketing specialists throughout the production cycle. In parallel, the EU should promote cross-border audience development initiatives, such as curated screenings (namely in educational settings), promotional toolkits, and regionalised communication strategies, to expand the visibility and cultural resonance of European films both inside and outside the EU.

Rationale: Findings from D4.1 show that marketing and promotional strategies are often developed only at the end of the production process, frequently after the film is finalised. Professionals highlight



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that this delays engagement with target audiences and limits the strategic positioning of European films in increasingly competitive markets. Early integration of marketing thinking would help bridge the gap between creative ambition and audience reach.

Develop EU-Level promotion strategy and pilot an EU Film brand

Recommendation: The EU should reinforce its pan-European promotion strategy by working closely with the European Film Promotion (EFP) and developing new tools to increase the visibility of European films. This includes piloting a light, complementary EU film brand co-designed with EU-wide industry associations, producers, distributors, sales agents, exhibitors, and festivals, to ensure it reflects the EFI's diversity and aligns with bottom-up perspectives. The brand and associated promotional mechanisms should be tested not only in international markets but also within the EU, encouraging cross-border recognition among European audiences and fostering a shared understanding of "European film" across Member States.

Rationale: Findings from D4.1 show that most professionals address promotion primarily from a national perspective and rarely conceptualise "European film" as a unified category when operating in international markets. This reflects structural fragmentation and funding frameworks organised around national lines. However, D4.4 indicates that non-EU professionals do in fact recognise European films as a coherent group, associating them with shared elements, such as cultural diversity, auteur-driven storytelling, and creative freedom, which mirror the core elements identified in D4.1 as defining the EFI. The convergence between internal and external perceptions reveals an untapped opportunity: the EFI possesses a recognisable identity abroad, even if it is not strategically leveraged by European stakeholders. The recommendation builds on this convergence by proposing that the EU leverage an existing and credible structure, such as EFP, which already coordinates promotional activities but remains limited. Developing an EU-level promotional brand, to be tested inside and outside the EU, would capitalise on this external recognition while addressing the gap identified in D4.1. Concerns about privileging certain countries can be mitigated by co-designing the strategy with EU-wide representative bodies.

Support festivals as strategic platforms for circulation, collaboration, and global visibility



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Recommendation: Strengthen targeted support for film festivals, both within Europe and internationally, as key platforms for the circulation of European films, the discovery of emerging talent, and the development of long-term professional networks. This includes increasing support for European professionals to participate in non-EU festivals, where visibility and networking opportunities are crucial, and expanding opportunities for independent non-EU professionals—especially from low-capacity regions such as Africa and Latin America—to attend EU festivals. Festivals should be further reinforced as hubs for co-production, sales, and international distribution, based as much as possible on a collaborative ethos linking EU and non-EU industry professionals.

Rationale: D4.1 highlights that festivals occupy a central position in the EFI: they function not only as cultural spaces but also as industrial infrastructures where films gain visibility, projects secure financing, and collaborations and sales are initiated. They remain one of the few consistent mechanisms enabling European films to circulate beyond domestic markets. D4.4 confirms that non-EU professionals view European festivals as a defining and highly valued element of the EFI, serving as essential venues for building ties, discovering new works, and forging international partnerships, although they also highlight the low number of opportunities for meaningful collaboration therein. Strengthening support for festivals on both sides - EU professionals attending non-EU events and non-EU professionals accessing EU festivals - addresses a need and leverages a valuable mechanism identified in both reports.

Strengthen VOD regulation to protect independent production, improve transparency, and ensure fairer market conditions

Recommendation: The revision of the Audiovisual Media Services Directive (AVMSD) should introduce stronger regulatory measures for VOD platforms to address the structural imbalances identified in the reports. Regulation should guarantee the protection of intellectual property by ensuring that ownership remains with independent producers, reinforce transparency obligations so that VOD platforms provide data on the performance of European content, and define clear and enforceable prominence requirements to ensure meaningful visibility of European works on digital services.

Rationale: D4.4 reveals that the professionals in the six surveyed international markets see VoD platforms, especially American-based, as potential news outlets of circulation and, simultaneously, as a source of increased competition that threatens the stability of the film ecosystem. Similarly,



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D4.1 shows that VOD platforms have become central yet highly problematic actors, concentrating data, decision-making power, and intellectual property in ways that weaken the position of independent European producers. The opacity of viewership data and algorithmic practices is a significant structural barrier, preventing professionals, researchers, and public agencies from assessing the reach and impact of European works. Without reliable data, evidence-based policymaking is compromised, and European institutions cannot adjust measures to support circulation, exposure, or investment needs. At the same time, D4.1 highlights that the weak negotiation power of producers in their interactions with global platforms risks eroding independent IP ownership, a core pillar of the EFI.

Redefine competitiveness through a value-based framework

Recommendation: The EU should adopt a broader, value-based and sector-sensitive definition of competitiveness that reflects the structural specificities and cultural mission of the EFI. This requires moving beyond narrow economic metrics, such as box-office performance or market share, and integrating indicators that capture cultural diversity, public value, artistic freedom, independent production capacity, and the sustainability of small and medium-sized enterprises. The framework should be explicitly informed by bottom-up perspectives gathered from professionals across the EFI. Public support should be recognised not as a corrective mechanism but as a foundational pillar that enables the core components of the EFI to exist and function: cultural diversity, high-quality independent filmmaking, and a non-concentrated industrial structure. Policies should ensure that new regulatory areas, including VOD and Artificial Intelligence (AI) governance, reflect this holistic understanding of competitiveness and reinforce rather than undermine the distinctive cultural and political values of the EFI.

Rationale: Findings from D4.1 show that European professionals' understandings of competitiveness are strongly aligned with the core elements that define the EFI, namely cultural diversity, public support, artistic freedom, and collaborative practices such as co-production. Professionals consistently emphasise that these features constitute the foundation of the sector's identity and long-term vitality. The report also cautions that prioritising a narrow, top-down agenda centred primarily on economic performance risks overlooking or undermining these structural and cultural pillars. In this sense, D4.1 underlines the importance of ensuring that policy frameworks recognise public support not as an assistance, but as the enabling condition that allows the EFI to exist in its current form and to remain competitive on its own terms. Findings from D4.4 reinforce



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this view from an international perspective. Professionals outside Europe describe the same EFI characteristics, public funding mechanisms, cultural diversity, independent and auteur-driven cinema, and strong festival and co-production networks, as the EFI's most distinguished and valued assets. These elements are repeatedly identified as the primary reasons why non-EU professionals seek collaboration with European partners, despite the barriers posed by distribution concentration and bureaucratic requirements. This convergence between internal and external perceptions demonstrates that the EFI's competitive advantage lies precisely in its cultural and policy model. Recognising and embedding these bottom-up perspectives into EU competitiveness frameworks is therefore essential to safeguarding what makes the EFI unique and internationally valued.



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Fernandes Rossato, M., Vlassis A., Bissot P., Solenn H. (2025). *The Framings and Strategies of Cinema Professionals. Report on “International Market” in the European Film Industry*, funded by the European Union’s Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769. <https://orbi.uliege.be/handle/2268/335660>.



REBOOT (www.thereboot-project.eu) has received funding from European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769.



Disclaimer

This document is part of the outputs of the Reviving, Boosting, Optimising and Transforming European Film Competitiveness – REBOOT project, which received funding from the Horizon Europe programme of the European Union under the Grant Agreement No. 101094769.

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Citation

Please cite this report as follows:

Vlassis, A., Fernandes Rossato, M, & Dâmaso M. (2025). *The Framings and Strategies of Cinema Professionals: Policy brief on perspectives of European and non-European professionals*. Developed by the Horizon Europe project REBOOT (Reviving, Boosting, Optimising and Transforming European Film Competitiveness – REBOOT), funded by the European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769. <https://doi.org/10.5281/zenodo.17738095>

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