



D7.4 Policy Roundtable Meeting

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

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Table of contents

| | |
|---|----|
| Project Description..... | 3 |
| Executive Summary | 4 |
| 1. Introduction..... | 5 |
| 2. Key messages | 7 |
| 2.1 Independence as the core value of European cinema..... | 7 |
| 2.2 Diversity, representation, and freedom of expression under threat | 8 |
| 3. Summary of discussion..... | 8 |
| 3.1. Rethinking cultural and economic value | 9 |
| 3.2. Structural imbalances and policy gaps | 9 |
| 3.3. The challenge of overproduction..... | 9 |
| 3.4. Rethinking “success” and measuring impact | 10 |
| 3.5. The digital shift and platform dependency | 10 |
| 3.6. Inclusion, diversity, and new generations | 10 |
| 3.7. Freedom, risk and regulation | 11 |
| 3.8. The question of who takes the risk | 12 |
| 4. Reflections..... | 12 |



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PROJECT DESCRIPTION

This report is part of the REBOOT project (Reviving, Boosting, Optimising and Transforming European Film Competitiveness), which focuses on the European audiovisual sector and its film industry. The REBOOT project aims to connect their strengths, identify and overcome weaknesses, and plan for future competitiveness in the fields of policy, practices and experiences. More concretely, the project's objectives are, on the one hand, to explore the long-standing strengths and pervasive gaps in European audiovisual competitiveness and policies for competitiveness-including ways of 'measuring', 'analysing' and 'evaluating' the impact of policies and strategic pathways. The project aspires to focus attention on actively preparing for the future by exploring audience preferences and how these are generated, as well as modes of film content production.

The latter are elements which today's youth will carry and engage with in the coming decades as makers and consumers, as well as industry and policy leaders. The project therefore interrogates the 'what is', but also the 'what has been' and 'what will be' through fresh lenses. REBOOT aims to provide a holistic overview of the European film industry, focusing on maximising its existing strengths while developing strategies and tactics to optimise the potential of European youth audiences, both as emerging viewers and as engaged citizens. Specifically, the project's goals combine several dimensions which reinforce each other but are listed separately (and in no particular order) for analytical purposes: a) increasing support intended to increase young people's engagement with European film; b) strengthening the position of the European Union (EU) in the global audiovisual economy, particularly in light of the rise of video-on-demand; c) supporting cultural diversity in the EU film industry; d) addressing the need for a different understanding of competitiveness and relevant indicators in this context; and e) recognising and supporting the importance for the EU of film and, more broadly, of the cultural and creative sector as a geopolitical asset.



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EXECUTIVE SUMMARY

This report corresponds to Deliverable 7.4, which focuses on the “policy roundtable” held as part of the Reboot Conference. The roundtable explored the evolution of the European Union’s policies and interventions in the film and broader audiovisual sector, with particular attention to how the EU has conceptualised and promoted the “competitiveness” of the European Film Industry within a rapidly changing technological and socio-economic landscape.

The objective of the policy roundtable was to connect Reboot’s research findings with policy practice, facilitating dialogue between researchers, policymakers, and industry professionals. The session aimed to identify how evidence generated through the project can contribute to shaping future European film and cultural policies that are both responsive and forward-looking.

By bringing together diverse voices from across Europe and internationally, the discussion sought to transform academic insights into actionable policy recommendations. The roundtable emphasised the need for inclusivity, sustainability, and democratic governance in the European film ecosystem, highlighting pathways to strengthen cultural and economic resilience in the years to come.



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1. INTRODUCTION

A dedicated two-hour policy roundtable at the REBOOT conference, moderated by Univ.-Prof. Katharine Sarikakis, brought together leading voices from across Europe's film institutions and beyond to reflect on the most pressing challenges facing the European film industry.

The discussion, moderated as part of the project's milestone on stakeholder engagement, aimed to test key findings emerging from earlier workshops and to explore the broader policy and governance questions shaping the industry's future.

It served as a moment for reflection and dialogue, building directly on the research findings presented during the first half of the event. The questions guiding the discussion were drawn from the sessions' results, ensuring a coherent link between empirical insights and policy debate. The policy roundtable presented an evidence-based exchange on how to address the sector's structural challenges and identify pathways toward a more sustainable and inclusive European film ecosystem.

Participants included representatives from public film bodies, professional associations, and academia, among them Roland Teichmann (Austrian Film Institute), Juliette Prissard (Eurocinema, Belgium), Rodrigo Gomez (Universidad Autónoma Metropolitana, Mexico), Mafalda Dâmaso (European University Institute and Erasmus University), and Marion Schmidt (Cultural Manager, Documentary Association of Europe, Germany). The debate centered on questions of independence, competitiveness, diversity, and public value in European cinema, emphasizing the vital connection between policy frameworks and creative freedom.

Katharine Sarikakis is a professor of Communication Science at the University of Vienna, Department of Communication. She has held positions as Santander Chair of Excellence at Universidad Carlos III de Madrid, visiting senior fellow at London School of Economics and Political Science, affiliate fellow at University of Witwatersrand among others. She has consulted with international organisations such as the Council of Europe and Organisation for Security and Co-operation in Europe and has received the Jean Monnet Chair and the Jean Monnet Centre of Excellence awards for research and policy on European integration in the fields of democracy and communication. Her research interests include media governance, media organisation and media industries. In 2011, she established the Media Governance and Industries Research Lab that she currently leads. She has consulted with local and national authorities and international organisations, such as the Council of Europe, European Parliament, OSCE and the UN on matters of culture, freedom of expression, journalism, hate speech and regulation and gender violence.



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Juliette Prissard serves as General Delegate of EUROKINEMA, representing and advancing the interests of European film and audiovisual producers. She joined the organisation in 2019 as Director of European Affairs and was appointed General Delegate in 2021. Her previous roles include General Delegate of the Syndicat des Producteurs Indépendants (SPI), Director of the Cultural Action Center at the SACD, and Deputy Director of the Syndicat National des Scènes Publiques (SNSP). Earlier in her career, she worked as an in-house lawyer for Ciby 2000 and Bac Films, and as a legal specialist in cinema and audiovisual law at Taylor Wessing.

Mafalda Dâmaso is a Researcher at the Erasmus University Rotterdam and the European University Institute. Her work focuses on EU cultural policy, cultural diplomacy, and visual culture, bridging academic research and policymaking. She contributes as a policy expert to the EU consortium CultureForHealth.eu and has previously served as Research Fellow at the University of Southern California's Center on Public Diplomacy, Culture and Foreign Policy expert at ifa (Germany) and consultant for the European Commission's Joint Research Centre. Her research advances understanding of culture's role in governance and diplomacy.

Marion Schmidt is a cultural manager, consultant, and facilitator working across film, culture and the NGO sector to promote equity, safety, and collaboration. She co-founded the Documentary Association of Europe (DAE), where she served as Co-Director from 2020 to 2024 and now acts as Board Member and Senior Consultant. She leads the #DocSafe initiative for safer working conditions in the documentary field and advises the DW Akademie Film Department. With nearly two decades of international experience, she works with festivals, markets, and institutions as a consultant, mentor, and coach, fostering inclusive and sustainable cultural practice.

Rodrigo Gómez is Professor of Communication Policies and Industries at the Universidad Autónoma Metropolitana-Cuajimalpa (Mexico). His research examines the critical political economy of communication, focusing on ownership structures and public policy in media industries. From 2014 to 2022, he chaired the Political Economy Section of the International Association for Media and Communication Research (IAMCR). He is co-editor of the book and series *Global Media Giants* (Routledge, 2017), contributing extensively to international scholarship on media power, regulation and the dynamics of global communication industries.

Roland Teichmann is the Director of the Austrian Film Institute. At the helm of the institute since 2004, he oversees national film funding, policy development and international cooperation within the



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European audiovisual sector. He began his career at the Austrian Federal Economic Chamber, later becoming Managing Director of the Association of the Audiovisual and Film Industry. He represents Austria in Eurimages and the European Film Agency Directors Association (EFAD) and serves on the boards of EAVE and the Austrian Film Commission. His work focuses on strengthening collaboration, policy alignment, and the competitiveness of the European film industry. Teichmann has among other publications co-edited the Springer *Handbook of State Aid for Film* (Murschetz, Teichmann, & Karmasin, 2018).

The REBOOT Conference attracted strong engagement both in person and online. On Day 1, 45 participants attended physically, followed by 47 on Day 2. Online participation was also significant, with a total of 742 cumulative live streams and 406 unique viewers across both days. These figures reflect the conference's broad reach and the high level of interest from stakeholders and audiences across Europe in the discussions on the future of the film industry.

2. KEY MESSAGES

2.1 Independence as the core value of European cinema

Roland Teichmann opened the discussion by identifying independence as the foremost challenge and defining value of the European film industry. He highlighted the growing pressures threatening this independence, from economic constraints and market consolidation to political influence and regulatory complexity. Teichmann underscored that Europe's distinctive filmmaking identity rests upon its capacity to sustain independent voices free from global market homogenisation. He also questioned the criteria defining a "European film," noting that even large-scale, U.S.-backed productions often qualify for European funding under current "cultural tests." This, he argued, undermines the intent of public investment meant to support authentic, culturally rooted European productions.

He further reflected on the political dynamics at play, observing that policymakers often favor internationally visible productions, those associated with Hollywood stars, over national or arthouse films that embody local cultural narratives. Such preferences, he suggested, reveal a lack of understanding about the true role of public film institutions and threaten the long-term integrity of Europe's film culture.



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2.2 Diversity, representation, and freedom of expression under threat

Building on Teichmann's argument, Marion Schmidt reinforced the importance of independence but warned that the values historically linked to European competitiveness, diversity, representation, freedom of expression, and public support are increasingly fragile. Drawing on her experience in the documentary sector, Schmidt described how structural racism, political polarisation, and shrinking public funding are undermining the inclusive and pluralistic ideals once central to European cinema.

She referenced the wave of social movements following the murder of George Floyd in the U.S. 2020, which initially galvanised European film communities to confront systemic inequalities. However, she noted that this momentum has since declined, and many initiatives promoting diversity and anti-racism have been discontinued.

Furthermore, Schmidt pointed to the mounting constraints on freedom of expression, particularly in countries experiencing democratic backsliding such as Hungary, and the growing pressures on filmmakers across Europe who take critical stances on political issues, citing, as an example, the backlash in Germany surrounding discourse on Palestine.

Finally, she warned that national film policies are becoming more nationalistic and less collaborative, threatening the cooperative spirit that has long defined the European film ecosystem.

3. SUMMARY OF DISCUSSION

The first part of the policy roundtable set a reflective and critical tone. Participants emphasised that the European film industry's future depends on defending its independence, both artistic and institutional, against the encroachment of commercial, political, and ideological pressures.

Independence, as framed by Roland Teichmann and Marion Schmidt, is not merely a structural condition but a moral and cultural cornerstone of European cinema.

The discussion also exposed a deep concern over the erosion of public support for independent filmmaking and the distortion of cultural policy objectives by global market forces. Both speakers highlighted the need for more transparent, principled, and inclusive definitions of what constitutes a "European" film and called for a renewed commitment to public value, cultural diversity, and democratic openness within audiovisual policy frameworks.



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3.1. Rethinking cultural and economic value

The discussion opened with reflections on how value is defined and measured within the film industry. Participants emphasized that while economic metrics, such as box office performance, viewership data, and profitability, remain dominant, these do not necessarily reflect the cultural or societal impact of cinema. There was broad agreement that policy frameworks tend to privilege short-term financial returns, often overlooking the long-term contributions of film to social cohesion, identity formation, and public discourse. The discussion called for a redefinition of success beyond market indicators, suggesting that European film policy should better capture cultural relevance, artistic innovation, and social inclusion as core measures of value.

3.2. Structural imbalances and policy gaps

Participants highlighted that the European film sector is shaped by complex governance structures, involving national film institutes, regional funds, EU programmes, and private players, which do not always align in their goals or criteria. This fragmentation can result in inefficiencies and policy gaps that hinder the ability to nurture diversity and sustainability. Mafalda Dâmaso reflected on this imbalance, noting that there is a lack of incentives towards developing long-term thinking or audience-building strategies. There are just no incentives at any level. This absence of strategic vision, she argued, prevents the sector from innovating or adapting to contemporary social realities.

Moreover, the discussion underscored the risk of a two-tier system, where established producers and institutions have stable access to resources, while emerging and young filmmakers struggle to secure consistent support. Policies were said to often reproduce inequalities rather than address them, particularly when public funding mechanisms favour known names or “safe” investments.

3.3. The challenge of overproduction

A recurring theme was the issue of overproduction, the ever-increasing number of films produced in Europe, many of which fail to reach audiences. Panelists noted that the proliferation of content, combined with shrinking attention spans and fragmented distribution platforms, creates a paradox: while production levels are high, visibility and impact remain low. This was seen as both a cultural and policy challenge. On one hand, overproduction can dilute quality and audience engagement; on the other, it reflects a funding logic that prioritizes quantity



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over long-term strategy. Stakeholders proposed that film policy should prioritise circulation, visibility, and accessibility, ensuring that funded works reach diverse publics across Europe rather than remaining within niche or national boundaries.

“We have a big problem with a short-termistic approach to the market. There are no incentives for long-term thinking, planning, or audience building. The cultural sector, by definition, thrives on experimentation, yet the current logic of competitiveness leaves no space for it to even happen” - Mafalda Dâmaso

3.4. Rethinking “success” and measuring impact

The conversation also questioned how “success” is defined in contemporary film policy. Traditional performance metrics, such as viewership or profitability, were seen as insufficient to capture the broader purpose of cinema as a public good. Participants argued that policy should incorporate qualitative indicators, such as contribution to cultural diversity, innovation, gender balance, and participation of underrepresented voices. The panel agreed that film is not only an economic product but a cultural expression, and that policies must reflect this dual nature. Developing new forms of data collection and evaluation, particularly on long-term social and cultural impact, was identified as a key priority.

3.5. The digital shift and platform dependency

Another major concern was the growing dependency of European filmmakers on digital platforms such as YouTube, Netflix, and other streaming services. While these platforms have expanded access and global visibility, they also impose market-driven constraints that often marginalise local and independent production. Participants discussed how the algorithmic logic of platforms reinforces homogenisation and popularity-based visibility, reducing the diversity of stories and formats available to audiences. There was consensus that public institutions must intervene to regulate digital markets and ensure fair remuneration, discoverability of European works, and protection of artistic autonomy.

3.6. Inclusion, diversity, and new generations

The roundtable highlighted the urgent need to engage young and diverse creators in the European film ecosystem. Despite various funding and training initiatives, barriers to entry remain high,



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particularly for individuals from non-urban, minority, or economically disadvantaged backgrounds. Experts of the roundtable emphasised that diversity must go beyond representation and become a systemic principle in policy design, shaping funding criteria, mentorship programmes, and governance structures. Without targeted support for young and emerging filmmakers, Europe risks losing a generation of talent whose perspectives could revitalise the industry.

Reflecting on the Austrian Film Institute's Talent Lab, Roland Teichmann explained how young filmmakers receive a year-long mentorship before competing for production support. Yet he admitted, "I was expecting something really experimental(...) and it was quite like, okay, something rather normal."

This revealed how institutional expectations can unintentionally discourage creative risk. Experts of the roundtable also discussed barriers for young filmmakers, noting that funding is always an interplay of power and privilege as Marion Schmidt said that film education often remains "Eurocentric (...) connecting only those already linked to the industry".

3.7. Freedom, risk and regulation

A particularly lively segment focused on the relationship between regulation, risk, and creative freedom. One of the central arguments was that real freedom of expression depends not only on artistic will but on economic conditions, especially access to pre-financing. Currently, many creators are financed only after their work is completed ("post-financing"), which pressures them to produce marketable or "safe" content. This leads to self-censorship driven by audience approval and platform algorithms.

Experts argued that pre-financing systems supported by regulation are essential for artistic risk-taking and innovation. Juliette Prissard emphasized that without pre-financing, there is no real freedom of expression. The conversation highlighted that regulation, rather than limiting creativity, can act as a protective and enabling framework, allowing creators from diverse backgrounds to take risks without endangering their livelihoods. A particularly charged part of the discussion focused on the relationship between regulation and creative risk-taking, with participants noting that taking artistic risks requires pre-financing rather than post-financing. Without such structures, young filmmakers may engage in self-censorship driven by economic insecurity, ensuring that their work aligns with audience expectations in order to survive, as Prissard concluded. Experts stressed that



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regulation should enable, not restrict, creative freedom, ensuring that risk is institutionally supported rather than individually shouldered.

3.8. The question of who takes the risk

The roundtable concluded by posing a fundamental policy question; who bears the financial risk of creative experimentation? Participants pointed to examples such as France's CNC initiatives for YouTubers as promising but limited models. For meaningful structural change, public policy must recognize risk-taking as a shared societal investment rather than a burden on individual creators. A critical policy question was posed: who will pre-finance the films that appear on YouTube tomorrow, enabling creators to take creative risks?

Discussion brought out France's CNC fund for digital creators as a rare example of forward-thinking policy, but noted that such models remain limited. The broader challenge, they agreed, is to reimagine cultural policy as shared investment, where risk-taking is seen as essential to Europe's creative vitality and democratic diversity.

This implies the need for dedicated funds, new financing models, and regulatory mechanisms that enable young filmmakers to develop sustainable careers. The European film ecosystem, it was argued, must move beyond reactive support and toward proactive cultural investment, ensuring that artistic risk, diversity, and innovation are institutionally protected.

4. REFLECTIONS

The policy roundtable underscored a shared conviction that the European film sector is at a crossroads. While it continues to demonstrate creative vitality and economic potential, its sustainability depends on rethinking how value, risk, and success are defined and supported. Participants called for a renewed policy vision, one that balances economic efficiency with cultural depth, integrates pre-financing and regulation as tools of creative freedom, and ensures that young, diverse, and risk-taking filmmakers are not only included but empowered to shape Europe's cinematic future.

The European film sector continues to face structural challenges rooted in outdated funding mechanisms and policy frameworks. Sustainability and competitiveness cannot be defined solely through economic indicators but must also encompass cultural value, artistic experimentation, and



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public service. Long-term planning, audience development, and the preservation of a diverse creative ecosystem remain essential. Film stands as a public good that requires protection through coherent and forward-looking governance.

At the same time, divergent perspectives persist regarding the notion of “overproduction” in European cinema. While it is often viewed as an economic issue, others reject this characterization, arguing that diversity and experimentation necessarily depend on a high volume of creative output. Bureaucratic funding procedures continue to pose challenges for young filmmakers, sometimes functioning as necessary checks, yet often as barriers to innovation and inclusion.

The economisation of culture, reflected in the growing tendency to assess cultural sectors through market-driven frameworks derived from industrial and technological models, risks undermining the film industry’s experimental, artistic, and democratic essence by reducing creative value to economic performance metrics. Equally important is the recognition of global asymmetries shaping the European cultural landscape, as policy directions increasingly reflect neoliberal logics and deepen dependence on non-European digital conglomerates.

Looking forward, the future of European cinema calls for a renewed model of competitiveness that acknowledges culture as both a creative and democratic force. This entails establishing pre-financing mechanisms to support artistic risk-taking, strengthening alliances beyond Europe, and developing new circulation models to enhance the visibility of European and Global South films beyond dominant streaming platforms. The need for simplified and inclusive funding processes remains central to empowering emerging filmmakers from diverse backgrounds and ensuring a sustainable, pluralistic film ecosystem.



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Disclaimer

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