



# Green Screen: Sustainability in Europe's Film Industries

WHITEPAPER

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A quiet but consequential shift is underway in European filmmaking. Environmental considerations—once seen as optional, expensive, or symbolic— are increasingly being built into the operational frameworks of production. This evolution is being shaped by a combination of environmental urgency, public funding requirements, and emerging policy design. Yet despite clear momentum, widespread adoption is still emerging, and the available data, while robust in certain regions, remains uneven across the continent.

This report examines Europe's leading sustainability programmes through a verified, data-led lens. What the evidence reveals is not a uniform transition but the rise of two complementary models of change:

A top-down regulatory approach centred in the DACH region, where compliance is built into funding conditions and professional standards.

A bottom-up, data-first movement led most notably by France, where more than **10,000** carbon assessments have now been completed, producing the world's largest dataset on audiovisual production emissions.

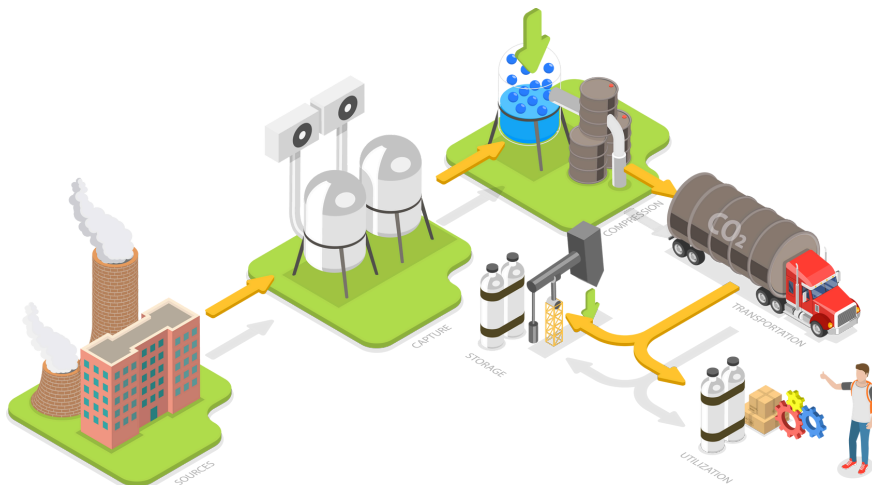


Together, these trajectories demonstrate that sustainable production has moved beyond idealistic advocacy. In regions where data is available, it is clear that sustainability has become an operational reality in some contexts—one that shapes funding frameworks, reporting requirements, and on-set practices. At the same time, the picture remains uneven: implementation is far from universal, adoption varies with market size and policy maturity, and large portions of the continent still lack consistent reporting structures.

Understanding the motivations behind these transitions requires further investigation, and this report—along with its accompanying statistics—helps lay the groundwork for that inquiry by identifying where change is occurring and where gaps persist. The hope is that such data will support deeper interpretive research into why producers, institutions, and policymakers adopt sustainable

practices: whether the drivers reflect vulnerability to external pressures, instances of symbolic or performative compliance, or indications of more substantive and systemic transformation.

Regardless, the findings point to a sector in transition. European filmmaking is building the foundations of a greener production environment, but the transformation is still developing its scope, depth, and consistency. What is becoming increasingly evident is that the most resilient path forward is a blend of regulatory pressure and data-driven insight—the combination most capable of scaling sustainable practice across diverse national industries.



# Introduction

Across Europe, sustainability is shifting from an aspiration to a structural expectation within film and television production. This shift is not merely driven by ethics or public sentiment; it is being embedded into the funding frameworks, compliance systems, and professional behaviours that shape how films are financed and made. Still, the degree of integration varies significantly across territories—and the transformation is far from complete.

Understanding how this change is occurring requires cutting through the ambitious language that often surrounds sustainability initiatives. The reality is more complex: in some countries, government mandates have accelerated adoption; in others, industry-led momentum has created powerful grassroots uptake. But the overall picture remains fragmented, and available data—while growing—is concentrated in a handful of more ‘advanced’ regions. This report aims to provide a grounded, quantitative baseline of these transitions. Rather than focusing on pledges or promotional claims, it examines the measurable indicators of progress:

- the number of certified productions
- the volume of carbon assessments completed
- and the financial incentives tied to sustainable behaviour



These metrics reveal both progress and limitation. They show where sustainable practice has already become embedded in day-to-day production, and where it is still emerging, inconsistent, or unmeasured. By analysing these data points across Europe’s leading programmes, I identify the models that are proving effective and the early patterns that are likely to shape the next decade of environmentally responsible film making.

# Analysis

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Country / Programme	Mandatory / Voluntary	Certified Productions	CO <sub>2</sub> Assessments	Incentives
Germany –Green Shooting	Mandatory	>20	Pre & Postproduction CO <sub>2</sub> footprint	Funding +Green Motion Label
France –Ecoprod /Carbon'Clap	Voluntary	120+	10,000+ assessments	Ecoprod Label
Austria – ÖFI / ÖFI+	Mandatory	Not aggregated	Final report required	5% Green Bonus
Green film / Europe-wide	Voluntary	>100	Emission reduction reporting	Cross-border recognition

This data presents a clear and immediate narrative. France's exceptionally high volume of carbon assessments points to a deep, sector-wide commitment to measurement practices. By contrast, the smaller—and more recent—certification figures in Germany and Austria reflect a decisive regulatory turn, leveraging public funding to catalyse systemic change

## Interpreting the Data: The Rationale Behind the Numbers

The figures themselves are only part of the story. Their significance emerges from the strategic intent that underpins each national model.

In Germany and Austria, the underlying strategy is one of structural compliance. By embedding sustainability standards into the requirements for publicly funded productions, both countries have established an immediate, non-negotiable baseline for industry participation. Germany's "Checklist for Change" exemplifies this approach. The compulsory engagement of a Green Consultant and the requirement to fulfil 18 of 21 mandatory criteria together form a robust, top-down regulatory framework. The result—more than 20 certified productions within a short timeframe— demonstrates its efficacy in driving rapid and broad adoption. This model privileges comprehensive rigour over voluntary speed, ensuring that any production receiving public funds adheres to defined sustainability expectations.

Austria adopts a complementary strategy, combining mandatory criteria with a significant financial lever: a 5% Green Bonus. This mechanism reframes sustainability not as an added cost but as a tangible financial incentive. It is a pragmatic design aimed at high compliance, positioning environmentally responsible practice as the economically advantageous choice for producers.

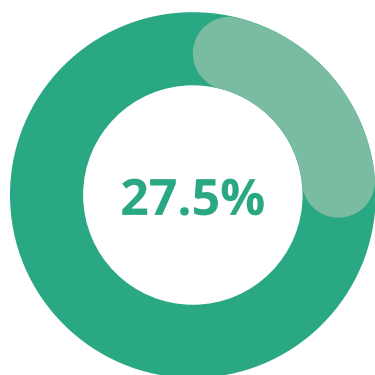


**Green Bonus**

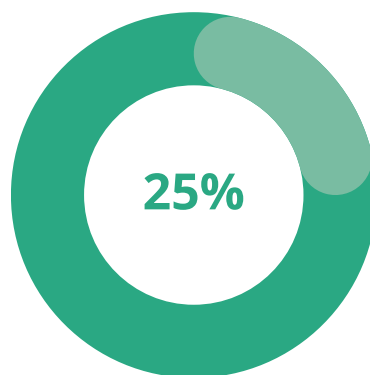
### Interpreting the French Dataset

France's approach differs markedly, functioning as a bottom-up system grounded in a strong cultural orientation toward data collection. The scale of its Carbon'Cla tool—exceeding 10,000 assessments—is central to its influence.

The strength of this voluntary system lies in its use of insight as incentive. By clearly identifying emission hotspots such as Transport (27.5%) and Goods/Sets (25%), the tool equips productions with targeted information to achieve cost-effective reductions. The Ecoprod label subsequently becomes a marker of leadership within the industry. This expansive dataset gives France considerable soft power, positioning it as a key knowledge centre for practitioners across Europe.



**Transport**



**Goods/Sets**



## The Integrating Layer: A Pan-European Framework

Amid varied national models, the development of Green.film—now surpassing 100 certificates—responds to a pressing industry need: greater harmonisation. For international co-productions, it offers a shared language and a transferable standard. Its growing adoption highlights the demand for streamlined, cross-border processes that minimise administrative complexity.

### Key Insights: What the Evidence Reveals

**Mandatory and Voluntary Systems Are Mutually Reinforcing:** The data indicates that mandatory frameworks (as seen in the DACH region) deliver immediate, guaranteed shifts in practice, while voluntary, data-rich systems (as in France) cultivate long-term cultural change and innovation. Future models may benefit from integrating both approaches.

#### Data Has Become a Critical Asset:

France's 10,000 assessments represent far more than a statistical achievement; they constitute a robust evidence base essential for monitoring progress, setting meaningful targets, and correcting misconceptions regarding the costs and challenges of sustainable production.

#### Incentives Are Varied and Strategically Deployed:

The success of multiple incentive types—from Austria's financial bonus to Germany's funding guarantees and France's prestige-based label—demonstrates that effectiveness depends on context rather than uniform design.

#### A Common Problem Emerges Across Systems:

Across all programmes, Transport and Materials consistently account for the highest emissions. This convergence offers the industry a clear and shared focus for future innovation and investment.

## Moving Forward: A Strategic Call to Action

The data points to distinct opportunities for key industry stakeholders:

### For Film Commissions:

Develop hybrid models that combine mandatory sustainability baselines for all publicly funded projects with voluntary, higher-tier certifications that include financial rewards, following Austria's example.

### For Production Companies:

Adopt data-led decision-making. Regardless of jurisdiction, incorporate a carbon calculator such as Carbon'Clap from the earliest development stages to identify efficiencies and make more economical, sustainable choices.

### For Policy Makers:

Prioritise harmonisation. Invest in pan-European mutual recognition frameworks that alleviate administrative burdens for international co-productions, using Green. film as a foundational reference point.

### For Industry Networks:

Act as multipliers. Build on the demonstrated successes of existing programmes to develop shared training resources and advocate for policy alignment, transforming national achievements into continental standards.



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