

Future Frame

# Future Frame

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## Featuring

Alexandre Dahan, Stupefy (France)  
Anders Berg, Fredo Pictures (Denmark)  
Sina Knoll, NDR (Germany)



## ‘The Perfect Crime’

Has the TV world finally run out of ways to kill?

A publication by

**COLEMAN  
MOSER**

## About FutureFrame

*FutureFrame* is a monthly digital publication dedicated to amplifying the voices of independent film and television companies across the UK and Europe. Each issue focuses on a single timely topic, blending industry insight with the lived experiences and perspectives of producers themselves. The goal is to highlight the sector's most pressing challenges — and the opportunities that lie ahead — in a format that is concise, accessible, and designed to spark discussion.

*FutureFrame* is published by **Coleman Moser Ltd.**, a London-based management consulting firm that specialises in supporting the independent production sector. Our work spans financing strategy, slate development, and partnership-building, always with a commitment to helping producers remain independent, original, and distinctive — while staying aligned with market realities and forging sustainable, long-term collaborations with key industry stakeholders.

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# Foreword

## Welcome to FutureFrame



My hope is that FutureFrame acts as both a mirror and a compass: reflecting our shared challenges while guiding growth, independence, and creative leadership forward.

London, October 2025

A handwritten signature in black ink, appearing to read 'Omar Zavala'.

**Omar Zavala,**  
Managing Director,  
Coleman Moser

I'm delighted to welcome you to the very first issue of FutureFrame, a new monthly publication dedicated to Europe's independent film and television producers. Our mission in launching this project is simple: to create a space where our sector can share perspectives, confront challenges, and explore opportunities with clarity and ambition. As independents, we often operate at the sharpest edge of risk and creativity, and yet our voices are too rarely amplified in the debates that shape the industry. FutureFrame is designed to change that – bringing sharp analysis, grounded data, and real opinions from producers themselves into a single, accessible format.

We chose crime television as our opening theme because it represents both the bedrock and the frontier of European storytelling. Crime is our continent's most bankable genre, yet in 2025 it is also evolving faster than almost any other – shifting between the enduring power of Nordic noir and the rise of lighter, hybrid formats like France's *HPI* or the UK's *Blue Lights*. This duality – between what has long worked and what is newly possible – makes it the perfect subject to spark our first conversation.

As you'll read in the next pages, the crime genre today poses a very real strategic question for independents: do we double down on noir's prestige and global appeal, or pivot toward new tones that might better capture fragmented, fatigued audiences? FutureFrame will not just observe these shifts – it will create a space to debate them, together. Each month, we'll tackle one pressing issue facing our sector, supported by insights from producers across Europe.

My hope is that FutureFrame acts as both a mirror and a compass: reflecting our shared challenges while guiding growth, independence, and creative leadership forward.

## Cover Story

**From Nordic noir to cosy capers — is Europe’s favourite genre changing tone for good?**

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On screen,  
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### European Crime Drama: Still Killing It.

On screen, the bodies may pile up — but behind the camera, the genre is more alive than ever. In 2024, global streamers ordered nearly a hundred new crime or thriller titles from Western Europe, pushing the region’s Crime & Thriller share from 28% in 2020 to 43% in 2024 — overtaking North America. The UK even matched the US for high-end crime series commissions (21 each).

Crime remains central to platform strategies because it travels, reaches broad demos and consistently drives engagement. In short, the genre remains Europe’s most bankable engine. It’s also structurally dependable for schedules: procedurals deliver repeatability, while limited-series thrillers generate promotional spikes and catalogue value.

Europe has long benefited from this dynamic. Nordic noir put European crime on the global map, and its legacy remains powerful. Denmark and Sweden keep exporting brooding thrillers built on bleak atmospheres, intricate plotting and psychologically complex investigators.



David Dencik and Danica Curcic in *The Chestnut Man*  
(Photo: Tine Harden/Netflix)



Morgane Alvaro (Audrey Fleurot) in the series “HPI.” PHILIPPE LE ROUX /  
ITINERAIRE PRODUCTIONS / SEPTEMBRE PRODUCTION / TF1



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Prestige noir retains its place as a premium export; lighter hybrids are becoming a complementary lane with distinct audience upside.



Sian Brooke as Grace Ellis (BBC)

Beyond the Nordics, the classic police procedural is alive and well. The UK's *Blue Lights*, following rookie officers in post-conflict Belfast, became a standout hit, praised for tense realism and humanity — proof that grounded, high-stakes drama with a local twist can still cut through. Crucially, it demonstrates that social-realism and character warmth can coexist with high jeopardy, broadening the emotional palette without lowering the stakes.

## Enter the Lighter, Brighter Crime Wave

While noir remains dominant, commissioners are clearly chasing tonal variety. Across 2025 slates, European buyers are asking for crime that breaks the gloom — humour, hope or romance alongside the core mystery — as audiences fragment and fatigue with relentless bleakness.

France Télévisions has said that when it co-produces internationally it now prefers adventure, romance or lighter fare over another grim local potboiler. That opens the door for genre-blends that would have seemed unusual a decade ago.

France's *HPI* is the poster child. The “police comedy” flipped the formula: Morgane Alvaro — a fiercely unconventional single mother with a 160 IQ — solves cases between school runs and razor-sharp quips.

The show smashed domestic records and travelled to 105 countries, spawning multiple remakes. Its feel-good mix — alternating lighter and more sombre beats — and a flawed-but-endearing heroine proved that optimism can travel as well as gloom.

Similar experiments are surfacing across Europe. Italy and Spain are developing buddy-cop dramedies and “crime-adjacent” romantic mysteries aimed at younger streamers. Even in Scandinavia, producers are trialling blue-sky mysteries — warmer locations, brighter palettes, character-led humour — without abandoning craft or stakes.

None of this signals the end of dark crime; the genre is bifurcating. Prestige noir retains its place as a premium export; lighter hybrids are becoming a complementary lane with distinct audience upside.

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Humour doesn't always travel, and market saturation could follow if everyone pivots to witty mysteries. A successful hybrid still needs craft discipline.

## What This Means for Independents

For independent production companies, this split is both an insurance policy and a provocation. The insurance: noir's continued dominance ensures steady demand, international value and awards-grade prestige for teams already expert in the form. Invest in writing, direction and production values and you can still sell a brooding thriller worldwide. Co-pro deals, regional incentives and staggered windowing can still make noir budgets workable for indies that pre-secure anchor broadcasters and a global SVOD. The provocation: the lighter wave creates new ways to differentiate — lower average costs, wider co-production appetite, and access to fresh demographics (youth, female-skewing, family). The catch: success depends on disciplined packaging and tonal control.

Commissioners are increasingly asking, “What is the twist?” A few years ago, a distinctive lead or unusual setting might have been enough. Today, a tonal proposition can be the differentiator. For indies without marquee IP or mega-budgets, a cleverly engineered hybrid — buddy-cop warmth, romantic-mystery chemistry, comedy threaded through a robust case-of-the-week — can punch above its weight if the procedural spine remains tight. Think in terms of exportable tone packages: a crisp case engine, a clearly marketed relationship dynamic, and a visual identity that signals light without trivialising. Lighter formats can also align with public-service prime time, creating PSB/SVOD windowing options.

As commissioners widen their briefs, indies must ask:

- How to carve out unique, exportable crime brands in a market dominated by global players?
- Does lighter crime open doors to youth and family audiences, or dilute the genre's edge?
- How much creative risk can a small or mid-sized indie afford when one failed experiment could derail a slate?



Kenneth M. Christensen in *Those Who Kill* (2019). Source: [foreigncrimedrama.com](http://foreigncrimedrama.com)

# Perspectives

## Alexandre Dahan, CEO of Stupefy (France)



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If you are close to your own reality, it resonates worldwide. You find universality in particularities. The key is honesty, not quotas or tokenism.

Alexandre Dahan is CEO of Stupefy, a French production company he founded in 2018. His credits include *Lost Media* (Canal+, 2025), *Mort sur les Pavés* (France Télévisions, 2026), and an upcoming France TV International series. He produced the César 2025 Revelations film and several acclaimed shorts. Previously, he worked in gaming and esports (Kadank, Webedia) before joining Canal+/Studio Bagel, where he produced hit web and TV shows. At Stupefy, he champions surprising, high-concept projects across genres, both for TV and cinema.

It is late morning when the video call connects. On screen, Alexandre Dahan, CEO of Stupefy, appears from his home in Paris. He is composed but carries the slight distraction of a parent on duty: his young son, unwell and back from school, drifts briefly into view. A spontaneous “Bonjour, ça va?” slips out before Dahan gently ushers him away. We exchange a laugh — I recall similar moments with my own daughter — an unexpectedly personal opening to a conversation about an industry under pressure.

### Why Crime Endures

Asked why crime drama remains Europe’s cornerstone, Dahan doesn’t hesitate. “It’s easier for both writer and audience. Start with a crime, and people are hooked. Someone is dead — you want to know who did it. Even if you’ve seen it a thousand times before, you still want to know.”

Crime’s appeal, he argues, is primal. “Television and fiction play with our deepest emotions, and death is the ultimate taboo. Religions exist to help us manage it — so crime stories touch something fundamental. What fascinates us is not the killer as a monster, but the idea that it could be your neighbour, your daughter. Every time, you ask: who is it this time? Why do we kill?”

### The Limits of Escapism

Dahan sees two enduring strands in European crime storytelling. First: the classic murder investigation, dark or not, centred on police officers who feel real. “That’s going to stay dominant. They look like real people, with their flaws and limits, and audiences can relate.”

The second strand — more exaggerated characters, larger-than-life cops — has, he believes, already reached its limit in France. “We had a recent show where the detective was so unreal, so ungrounded, the audience couldn’t empathise. It went too far.”

For him, the lesson is clear: escapism only works if it remains rooted in reality. “In this time of perpetual crisis, people want both escape and characters they can actually root for.”



## Who Watches, and Why



Television today, is about comfort. But we still need to surprise. Otherwise, why would people keep watching?”

French audiences for crime skew older, he notes — sometimes 65 or 70-plus. They flock to long-running TV movies with familiar formulas, each set in a different small town, mixing murder with local myths. “It’s comfort food,” Dahan says.

But younger audiences gravitate toward darker serials with ongoing cases, often revolving around parenthood and missing children. Gender divides are visible too: older women favour the domestic noir of French TV, while men lean toward serial killers and long-form thrillers. International streamers like Netflix and HBO, he observes, attract a more balanced, mixed audience.

## Risk and Pragmatism

As a young producer, Dahan is candid about the climate. “There is a shrinking of content budgets. Broadcasters have told us directly: they will still commission, but with less money for each show. That means less risk.”

His own strategy has shifted. “For six or seven years, I tried to show originality and humour in my proposals. Now? I’m being pragmatic. People don’t want to be bothered when they come home. They want safety — like a child with a blanket or soft toy. That’s partly what television has to provide right now.”

Still, he resists the idea of pure repetition. “Most producers will replicate what works. A few of us will still try to innovate. For me, the trick is to stay grounded: relatable characters, complex cases, stories about our society. That’s where originality can survive.”

## Particular Stories, Universal Reach

When asked how his shows travel abroad, Dahan points to Netflix’s model: the more specific, the more universal. “If you are close to your own reality, it resonates worldwide. You find universality in particularities. The key is honesty, not quotas or tokenism. I don’t want to be progressive just for the sake of it. I want to tell stories about ordinary people who haven’t been shown before, but in a subtle way, without asking the audience to make an effort.”

## Looking Across Europe

France, Germany, Italy and Spain remain the strongest markets for his productions, with Spain particularly ascendant. “Five years ago, we never watched their shows. Now, everyone does. They’ve grown so much.” The UK, he adds, is harder: “They already have too much of their own.”

## The Producer’s Balancing Act

As the call draws to a close, Dahan reflects with a mixture of pragmatism and conviction. The producer who began our conversation balancing work and family life ends it with a clear statement of purpose.

“Television today,” he says, “is about comfort. But we still need to surprise. Otherwise, why would people keep watching?”

# Perspectives

## Anders Berg, CEO and founder of Fredo Pictures, Denmark



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Anders N.U. Berg is the founder and CEO of Copenhagen-based Fredo Pictures, a genre and auteur-driven production company launched after his tenure as Head of Development at Drive Studios. A graduate of NYU's Stern–Tisch dual programme in producing and finance, he has credits including *My Different Ways* (DR Sales), *Limboland*, and *Two Days* (HBO). With substantial private backing, Berg is building an ambitious slate of 8–10 projects, combining commercial IP with top creative talent for Danish and international audiences.

The screen flickers into life and Anders Berg appears, bathed in southern Spanish light. The Danish producer, founder of Fredo Pictures, is on a video call but still manages to exude the kind of relaxed intensity that has long defined Nordic creatives. Behind him: bright walls, a hint of Mediterranean ease. In front of him: a conversation about Europe's darkest, most enduring genre.

### The Genre That Refuses to Die

“Every few years, someone declares crime dead,” Berg begins, smiling with a trace of fatigue. “Markets announce the next big thing — sci-fi, young adult, whatever. But then you look at the numbers, and crime is still the foundation. It outstrips everything else, year after year.”

For him, crime remains a bedrock because it is universal. Romance, he argues, differs in cultural expression, and comedy is notoriously hard to translate. “But crime is the same everywhere. It's exciting, it's escapist. You can watch something dangerous from the safety of your sofa. That works in Bangladesh, Denmark, or Los Angeles.”

### Why Lightness Matters

Yet despite crime's dominance, Berg sees the tonal centre shifting. “Audiences want the same engine — a crime, an investigation, a story that pulls you along — but they're looking for it mixed with lighter notes.” He cites *Only Murders in the Building* and Richard Osman's *Thursday Murder Club*, alongside Netflix's recent *Department Q* adaptation. “Those books and films were incredibly dark in Denmark. Scott Frank took the same source material and deliberately injected comedy. It's a signal of where we are: dark times, but people want lighter escapism.”

The shift is reshaping what gets financed. Berg's company is currently packaging a serial-killer series based on a famous Danish case. “Five years ago, it would have been snapped up. Now? We're struggling. A German broadcaster turned it down last week — said it was too dark. And it's not even Dahmer-dark, it's just a procedural. That says a lot.”

## Bank Robbers and Neighbour Wars

Fredo Pictures is pivoting. Two crime comedies are already in play — one that has caught the attention of Amazon, and another exclusively offered to Netflix. The Amazon pitch draws on a true story of Denmark's most prolific bank robbers, who knocked off 50 or 60 banks in under two years, only to blow their modest takings on nights out. "It's absurd, funny — but still crime," Berg says.

The Netflix project, developed with a young creator he calls "the next big thing in Europe," is more contemporary: a neighbourly feud spiralling out of control, escalating from pettiness to violence. "It's very comedic, very modern — and it still has a crime core. Streamers love this mix because it plays younger but doesn't alienate older audiences."

That demographic tension, he argues, is key. Traditional broadcasters skew 65+, but commissioners are desperate for younger viewers. "Crime comedy, in its DNA, leans younger. It might be the bridge."

## Absurdity as Storytelling DNA

For Berg, the injection of comedy isn't just commercial. It reflects a deeper storytelling truth. We recall a scene from *Breaking Bad*, where Walter White, in his underwear, flees across the desert. "It's absurd, ridiculous, but it makes the darkness easier to watch. Absurdity itself becomes a protagonist. It reminds us that life is random, and there's reassurance in that — our own chaos mirrored in fiction."

## Nordic Noir or Nordic Blue?

What then of the genre that made the region famous? Berg suggests Nordic Noir may be going into hibernation. "I've heard people call the new trend 'Nordic Blue' — lighter, softer, more optimistic. The days of endless bleak forests might pause for a while. Even broadcasters are calling for it: Denmark's TV2 recently asked for lighter crime specifically."

But he's not declaring the end. "Trends are cyclical. By 2028, when some of these lighter shows finally hit the screen, the world might feel brighter, and audiences might demand darkness again. Quality always survives. The great showrunners will keep making what they want."

## Why Crime Travels

Asked why crime crosses borders more successfully than almost any other genre, Berg leans back. "Because the psychology is universal. Society sets up rules so we feel safe. Crime stories break those rules. Watching that play out is fascinating everywhere. A pickpocket in Copenhagen, a spy in Washington, a terrorist in Islamabad — they're all part of the same dramatic box: people testing the edges of society."

This elasticity allows crime to stretch from the street corner to geopolitics. "A spy thriller is still crime. Nuclear weapons in the wrong hands? Crime on a geopolitical scale. That's why I'll watch any spy story going. It's all about where society breaks."

## The Long View

As the call winds down, Berg acknowledges the paradox of timing. "TV takes years. By the time these comedies are released, the mood may have shifted again. But that's our job as producers — to gamble, to anticipate, and to hope that when the world changes, our stories still resonate."

His final line is measured, confident. "Crime isn't going anywhere. It's just learning to laugh at itself."

# Perspectives

## Sina Knoll, Producer and Production Executive at NDR (Germany)



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European crime drama, half a century on, is still television's most reliable ritual — and its future, like its past, will be written in corpses, clues, and the curious joy of solving them.

**Sina Knoll** is a Hamburg-based producer and Production Executive at NDR, overseeing international co-productions and pre-sales within the Commissions and Co-Productions department. With nearly two decades of experience across broadcasters and production companies, she has managed more than 400 hours of programming, produced a variety of films, led rights acquisition and sales, and built partnerships with major players including National Geographic, BBC, NHK, CBC, and ARD. Her career spans wildlife films, documentaries, and fiction grounded in hands-on production expertise and cross-continental collaboration.

When I connect with Sina, over a videocall, she makes a small disclaimer before we even begin. 'If you want really cool answers, you should probably talk to a commissioning editor,' she says with a smile. 'I'm mainly on the business side.' Yet what follows is far from dry. Knoll's perspective is one of the hidden gears of European television: the place where books become contracts, stories become budgets, and long-standing genres find their footing in new contexts.

### Friday nights with Tatort

Knoll starts with history. "The roots of crime drama are very old," she explains. "It began in literature. Crime novels were popular in Germany since the 19th century, and when public television came in the 1960s, it probably quite naturally became entertainment for TV as well." In Germany, crime has long been ritual. "When I was a child Friday night and Sunday night had crime slots and my parents and older brothers gathered in front of the TV. Everyone knew it." She recalls her own childhood with only three channels to choose from, all public broadcasters. "We didn't have private TV or satellite yet during those days. So, Friday and Sunday crime shows were part of family life - for the grown-ups." At the centre of this ritual stands Tatort, the long-running series that has aired every Sunday since the early 1970s. Produced collaboratively across Germany's federal state broadcasters, each region provides its own team of investigators, infusing the show with local color.

"You can see Bavarian crime stories one week, northern stories the next. The cultural differences are real, and people even gather in cafés or bars to watch together. Tatort has evolved to become a sort-of cult-classic – already decades ago until today." That longevity matters. Half a century on, Tatort continues to command some of the country's highest ratings. "There are even fan clubs," Knoll notes. "It's part of our shared culture."

### A genre that endures

Why does crime endure while other genres fade in and out? For Knoll, the answer is as pragmatic as it is psychological. "If you have a corpse and no one knows how it came to be, you are already hooked. Suspense easily created, and the regional setting, language and mentality where Germans can relate to are key. Also, Tatort format is compared to movies with 90min length quite short and a solid and relaxing dive out at the end of all weekend activities where you can cozy together on the sofa before the working week starts again. As most formats it offers mental escape from your everyday problems. You sit in front of the TV with crisps, and let yourself get hooked." This isn't mere escapism. It is a way of engaging with taboo emotions, she suggests. Death, violence, justice — these are primal themes that fiction allows us to process safely. "Crime is entertainment, but it's also catharsis."



## Comedy, capers and crossovers

Still, crime today is evolving. Alongside noir and procedural staples, lighter tones have emerged. “Even in conventional crime there were always investigators with a comedic touch,” she says. “Now it’s stronger, partly because of streaming platforms, which attract younger audiences. And there is also an American influence: comedy in the US is different, this might be bleeding into European shows.”

She cites *HIP*, a French series acquired by NDR for its streaming platform, as an example of crime infused with playful energy. “But that doesn’t mean classical crime will disappear,” Knoll insists. “Nordic noir, or its equivalents in France, the UK or Germany, will still remain popular. Lighter crime is an add-on, not a replacement, I think.”

## Local stories, global resonance

One of Knoll’s recommended is *Seconds*, a Finnish series and NDR-YLE co-production centred on a highly sensitive accident investigator. The main protagonist arrives at catastrophe sites — car crashes, disasters — and then she pieces together what happened while having to confront some shadows from her own past. It’s definitely not comedic. However, the character has unusual traits and sensing gifts. And it captures the very specific local Finnish atmosphere.”

This, Knoll believes, is the key for independent producers: authenticity. “Don’t try to write a British crime story if you’re German. Capture the feel of your own location. That’s what travels. In *Line of Duty*, you feel the cold rain, and the stuffiness, the tristesse of the British city when some officials turn to criminal activities for a better life outcome for themselves. It’s authentic, and that’s why it works so well.”

## Balancing risk

For producers, the dilemma lies between convention and originality. “If you’re too conventional, you risk being derivative. If you’re too experimental, you may struggle to travel,” Knoll acknowledges. But she resists prescribing formulas. “It depends how risky you want to be. Out-of-the-box storytelling is always needed and to great extent appreciated by audiences. But for crime series, authenticity of setting is what convinces audiences across borders.”

She points to the power of contrasting characters: “The best teams are the ones where worlds collide. A city police officer in the countryside, investigators from different backgrounds. Their personal differences create friction — the higher the drop height, the better, I find, for, when they connect, when they find something in the other they can understand and relate to or are shown something they have lost and remember in themselves when working with their colleagues the effect is stronger because viewers follow their journey and then can connect more, too. The human aspect is key.”

## What comes next?

Asked to forecast the next hybrid, Knoll hesitates. “We might see sentimental crime dramas,” she says with a grimace. “Because of the global political landscape, audiences are under perceived stress and are looking for more comfort. There is an audience for everything.”

Her ambivalence is telling. Crime drama, for all its reinventions, remains a mirror of society: both its anxieties and its appetites. Whether sombre or playful, local or international, the genre endures because it adapts without ever losing its primal hook.

Knoll may insist she is “mainly on the business side,” but her observations cut to the heart of the matter. European crime drama, half a century on, is still television’s most reliable ritual — and its future, like its past, will be written in corpses, clues, and the curious joy of solving them.

# Takeaways

## Command the Middle Ground Between Comfort and Surprise

Audiences still turn to crime for reassurance — but they stay for reinvention. Master the space between ritual and risk: deliver the familiarity viewers crave while injecting tonal or structural twists that renew the genre's pulse. Control the equilibrium, don't chase it.

## Make Tone Your Trademark

In a crowded market, tone travels faster than story. Treat mood, rhythm, and humour as ownable IP — the emotional signature that distinguishes your work. Build exportable tone packages audiences can recognise instantly, as you would a returning character or brand mark.

## Authentic Voices, Global Resonance

Authenticity begins with who tells the story, not just where it's set. Local detail and credible characters create the universality that travels. Ground each project in lived texture and distinctive contrasts — the clash of worlds, temperaments, or generations that make European storytelling relatable everywhere.

## Build a Balanced Portfolio of Darkness and Light

Tonal diversification is creative evolution and financial hedging. Anchor your slate in prestige noir to preserve credibility and repeatable value, but invest selectively in hybrids that reach younger and broader demos. Stability through contrast — that's the new independence strategy."

## The Conversation Continues...

Europe's crime drama is living a double life — between darkness and light, comfort and surprise. The next chapter belongs to those who can balance both.

Where do you see the genre heading?

Share your thoughts, questions, or topic suggestions with the FutureFrame team at [info@colemanmoser.com](mailto:info@colemanmoser.com), and join the ongoing discussion on [LinkedIn](#).

Are you Team Noir, Team New Wave, or somewhere in between? The debate starts with you.

## Sources and Further Reading

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