



# A market in transition

2024



# A market in transition

**2024 got off to a strong start. Demand grew and job postings were up. But this was reversed in the second half and the level of available consultants reached**

**all-time high. Growing opportunities for project managers and experts offered a glimmer of hope.**

Brainville is the largest independent marketplace for freelancers and consultants in the Nordics. As an extension of [brainville.com](https://brainville.com), we have added [Brainville Statistics](#), where you can drill down in the statistics of your choice about the freelance and consulting industry. Brainville Statistics is updated on a monthly basis. This is an overview of the market development in 2024.

## The market in numbers

2024 vs 2023

<b>Published assignments</b> <b>-3.6%</b>	<b>Remote work</b> <b>-2.3%</b>	<b>Project manager assignments</b> <b>+14.8%</b>
<b>Available consultants</b> <b>+26.9%</b>	<b>Applications</b> <b>+25%</b>	<b>Registrations</b> <b>+23.5%</b>

Usually a good indicator of where the market is heading.

2024



## A strong start followed by stability

2024 started strong in the Nordics with an early peak in the number of assignments on offer already in January, followed by a decline until March and a significant increase in April. This unusual seasonal pattern meant that job postings were up during the first half of the year, slightly in relation to the first of 2023 but significantly compared to the previous six months.

But this encouraging trend did not carry over into the second half of 2024. While Poland saw

significant growth of almost 70%, starting from a low volume, the number of assignments fell across the Nordic region, with the exception of Finland, resulting in a 4 percent drop for the full year.

At the same time, the number of registrations on the Brainville platform increased by 24 percent, reaching a new all-time high by some margin for the second consecutive year. This was mainly accounted for by a rapidly growing share of freelancers, who now represent more than 80 percent of the consultants on the platform.

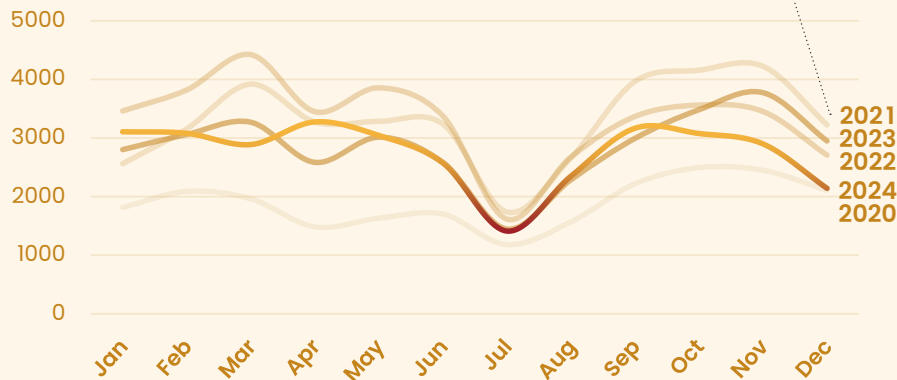
2024 also saw rising demand for more skilled and senior consultants. This shift in the level of competence requested in the market could be interpreted as a sign of better times ahead, with buyers not settling for just any consultant but allowing themselves to go for an expert.

Paired with the increasing registrations of self-employed and freelancers, it suggests a continued trend of more small scale consulting companies offering expert services.

## Assignments

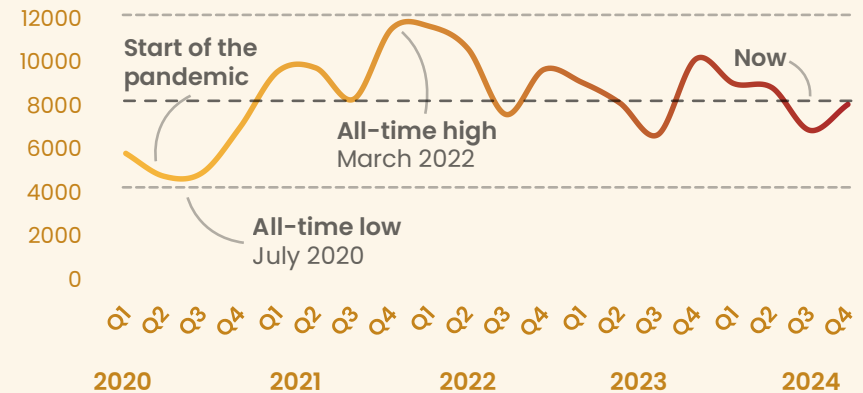
### What about duplicates?

2% of the market's assignments appear to be duplicates.



## Construction's surprise growth

Building & Construction is small but expanding its share, making it a niche to watch in the coming year.





## Unaffected by inflation - with notable exceptions

Prices on the Brainville platform were down slightly during 2024. Buyers lowered their offered rates slightly more than consultants lowered their asking prices.

Considering the relatively high inflation rates in recent years it seems somewhat surprising that consultants' rates have not followed suit. All-time high numbers of available consultants in the last couple of years meaning increased

competition could be part of the explanation, together with increased cost control from buyers in a weak economy.

There were however exceptions offering hopeful signs. Buyers proved willing to up their offers for management roles such as project manager, scrum master, product manager and technical lead during the year, the same applied to roles in UX/UI as well as various roles in "Data X" including data analysts, data scientists and database developers.

*– Many rates are quite low if you take inflation, demand and other factors into account. It is most obvious for developers and for more general roles, while specialist- and leadership roles have fared slightly better, said Brainville CEO Manuel de Verdier.*

## Rates in numbers

**Sellers' rate**  
**-0.7%**

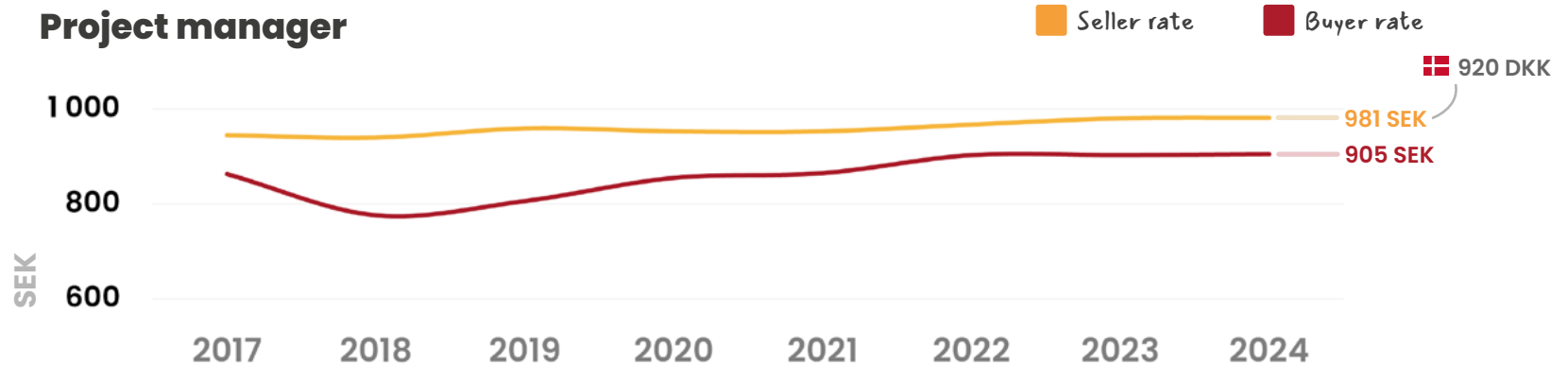
**Buyers' rate**  
**-0.9%**

### A rate conundrum

If we only consider inflation, a .NET developer who charged 791 SEK/hour in the fall of 2017 should today be earning just over 1,000 SEK/hour. However, according to our statistics, .NET developers currently earn just over 850 SEK/hour.

At the same time, it's worth noting that wages in Sweden decreased by 6.3 percent from 2017 to 2024, adjusted for inflation. All of this according to Ekonomifakta.se.

2024

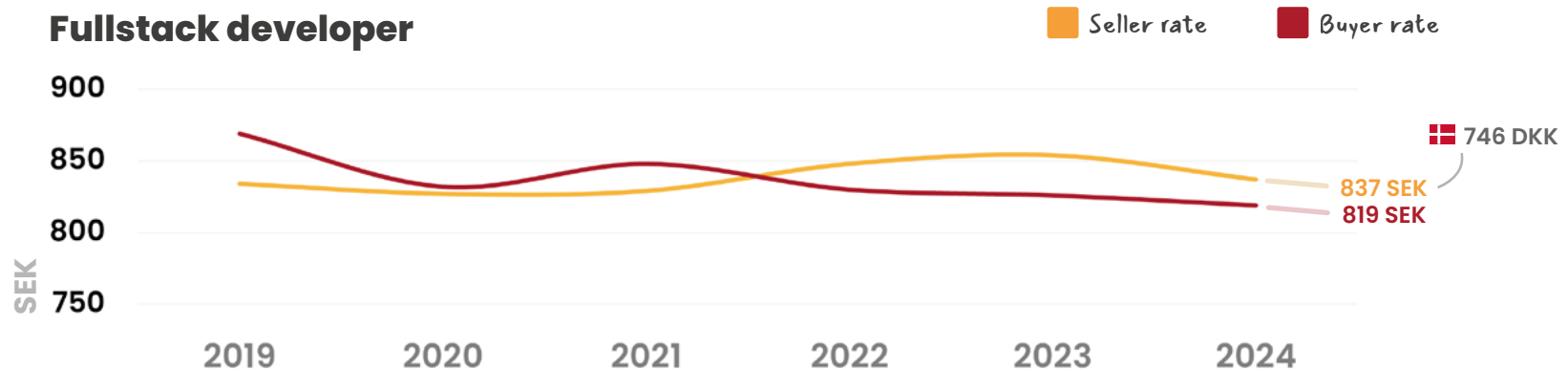


## Related roles (Hourly rates are in SEK unless stated otherwise)

Buyer rate (red)  
Seller rate (orange)

<b>Agile coach</b> <b>891</b> 1020	<b>Scrum master</b> <b>873</b> 900	<b>Technical project manager</b> <b>884</b> 836	<b>Product owner</b> <b>901</b> 963	<b>Change manager</b> <b>919</b> 1022
<b>Technical lead</b> <b>905</b> 946	<b>Team leader</b> <b>870</b> 960	<b>Product manager</b> <b>943</b> 997	<b>Business developer</b> <b>895</b> 1043	<b>Business analyst</b> <b>856</b> 931

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## Related roles (Hourly rates are in SEK unless stated otherwise)

Buyer rate (red)  
Seller rate (yellow)

Frontend developer

**804**

813

Backend developer

**814**

850

System architect

**902**

932

System integrator

**846**

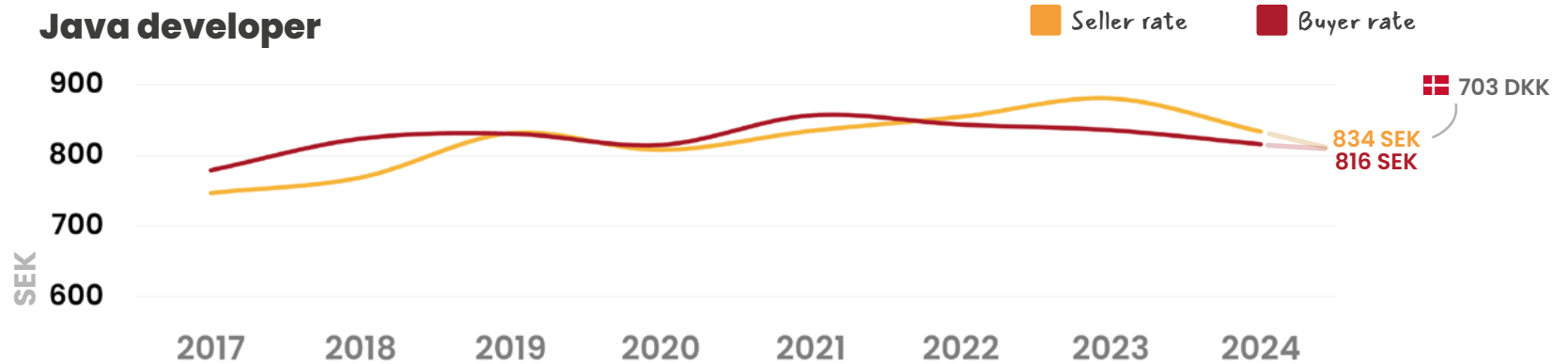
897

Embedded developer

**836**

824

2024

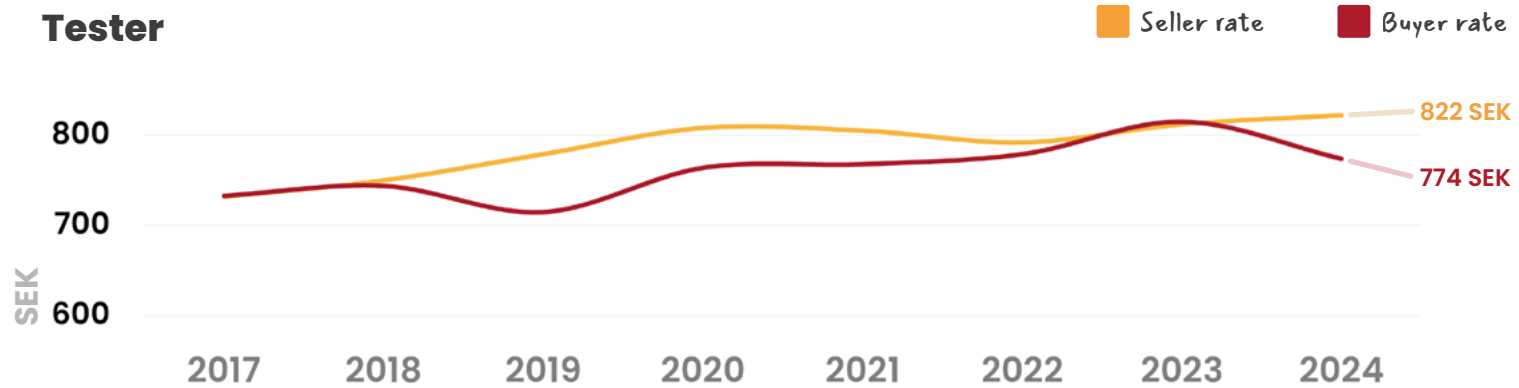


## Related roles (Hourly rates are in SEK unless stated otherwise)

■ Buyer rate  
■ Seller rate

<b>.NET developer</b> <b>812</b> 777 DKK 845	<b>Python developer</b> <b>819</b> 845	<b>C++ developer</b> <b>808</b> 847	<b>Android developer</b> <b>849</b> 845
<b>Javascript developer</b> <b>813</b> 828	<b>PHP developer</b> <b>808</b> 816	<b>C developer</b> <b>778</b> 851	<b>iOS developer</b> <b>830</b> 846

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## Related roles (Hourly rates are in SEK unless stated otherwise)

■ Buyer rate  
■ Seller rate

Technical tester

**804**

837

Test manager

**847**

890

Requirement analyst

**858**

915

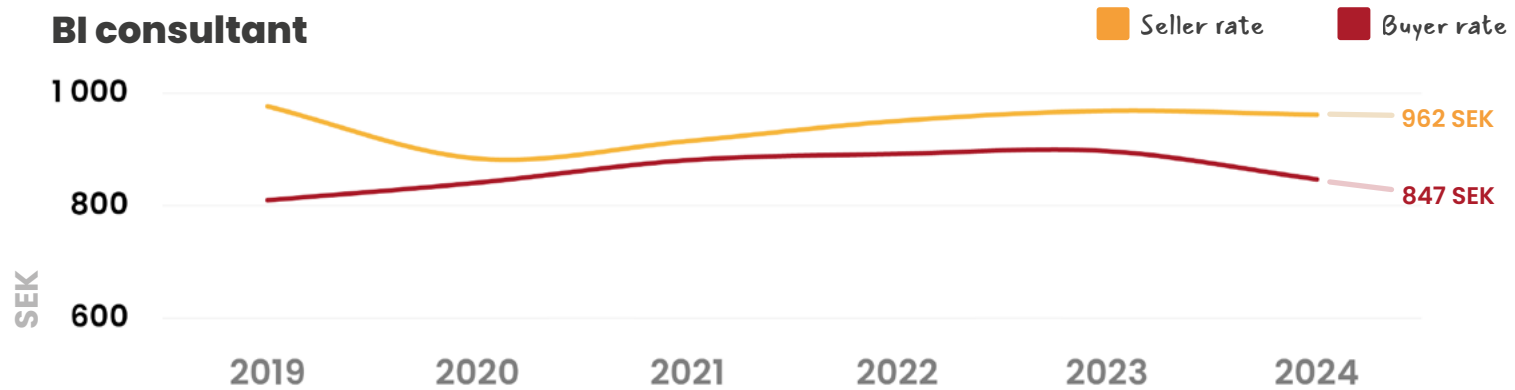
Test automator

**843**

840

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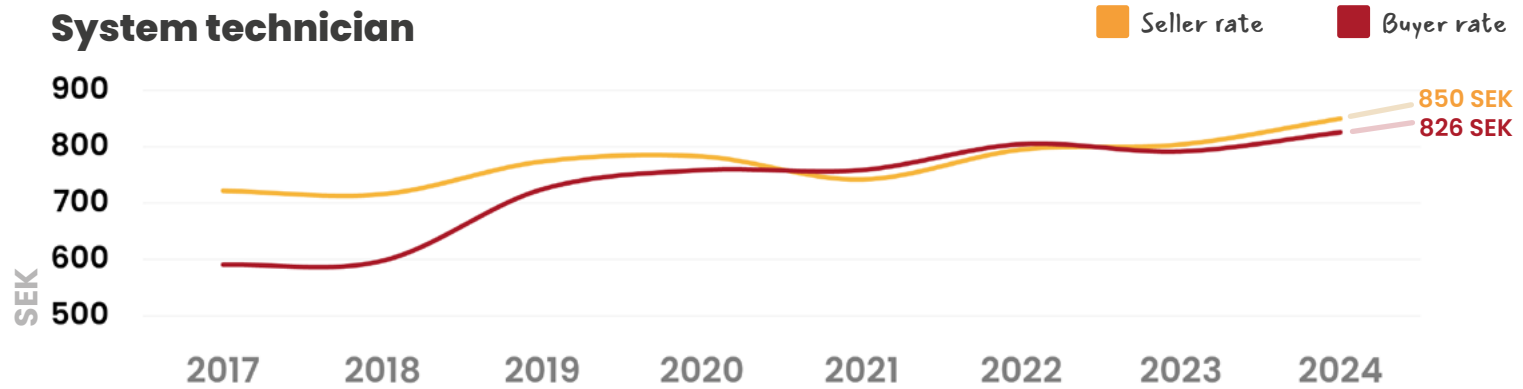


## Related roles (Hourly rates are in SEK unless stated otherwise)

■ Buyer rate  
■ Seller rate

<b>DBA</b> <b>855</b> 890	<b>Data scientist</b> <b>874</b> 942	<b>Data engineer</b> <b>845</b> 891
<b>Data analyst</b> <b>870</b> 912	<b>Database developer</b> <b>876</b> 894	

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## Other roles (Hourly rates are in SEK unless stated otherwise)

Buyer rate  
Seller rate

<b>UX designer</b> <b>788</b> 748 DKK <b>836</b>	<b>DevOps</b> <b>852</b> <b>883</b>	<b>System administrator</b> <b>814</b> <b>880</b>
<b>UI designer</b> <b>813</b> <b>847</b>	<b>IT security specialist</b> <b>906</b> <b>1096</b>	

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### Available consultants reaching all-time high

As the Brainville platform kept growing in terms of registrations during 2024, the number of available consultants increased by almost a third compared to 2023. This resulted in new all-time high numbers in the autumn months, with higher levels than usual in relation to the normal seasonal pattern.

In better news for consultants, the drop in

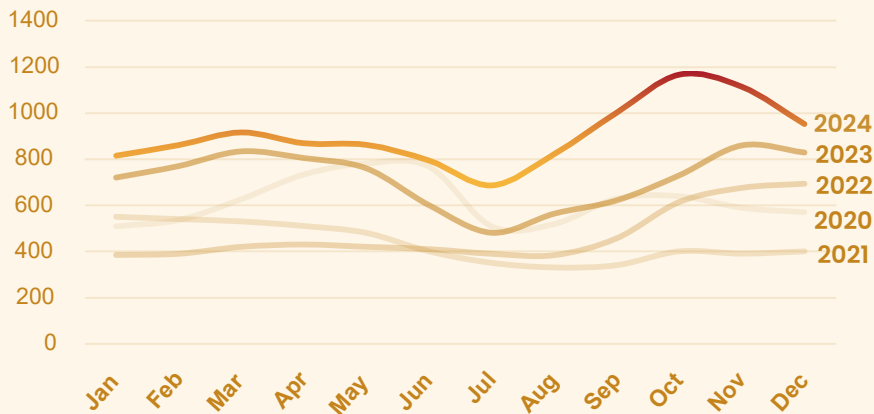
demand in IT & Telecom relative to other sectors seen in previous years was halted in 2024. This was mirrored by increased opportunities for system developers and system architects who were among this years winners along with database- and BI consultants.

Relative demand also increased in the Management & Strategy sector, notably with a clear rise in demand for project managers specifically. A tentatively positive sign as increased opportunities

for project managers normally means that more projects are getting the green light to start.

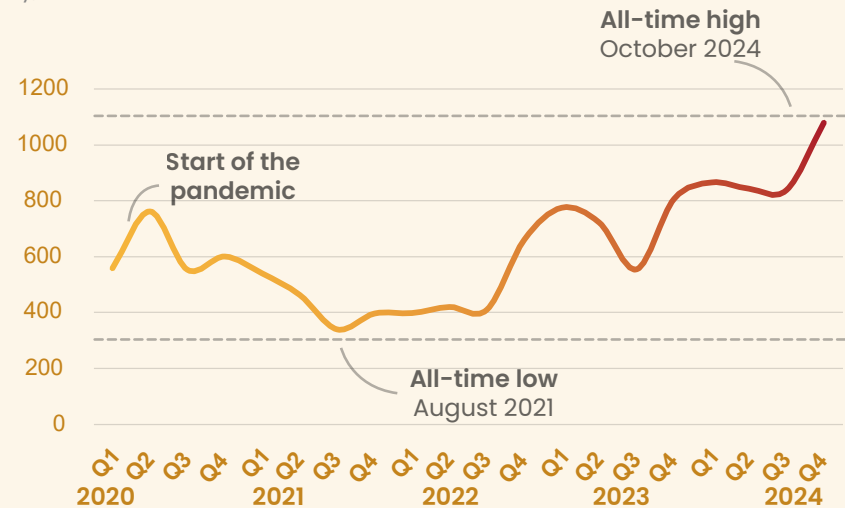
Also worth noting was the increased demand in Technology & Engineering, in absolute numbers as well as relative to other sectors, along with positive signs in the Building & Construction and Human Resources sectors respectively.

### Available consultants



### Be your own boss











The number of umbrella contractors shot up by 85% compared to 2023. Evidently, freelancing fever is spreading.





## Top assignment volume











Companies with the most freelance and consultant assignments.

1	 Ework	-
2	 Emagine	↑
3	 Upgraded People	↑
4	 Sverek	↓
5	 AFRY	-
6	 Deploja	↑
7	 Danir Development	↑
8	 Chas Visual Management	-
9	 Witted	↑
10	 KeyMan	↓

2024











## Top reply frequency

Companies most responsive to applications from freelancers and consultants.

1	 NetNordic	—
1	 Specify IT	↑
1	 Avenit Consulting	↑
4	 Iceberry	↑
5	 ZERO8	↓
6	 Milsvida	↓
7	 Techvision Consulting	↑
8	 EDGE Associates	↑
9	 Tingent	↓
10	 Developers Bay	↑

## Top assignment quality

Companies with the most detailed assignments for freelancers and consultants.

1	 EDGE Associates	↑
2	 House of Skills	↑
3	 Finga	↑
4	 Milsvida	↑
5	 Gansa	↑
6	 Techfactory	↓
7	 Accuro	↑
8	 Skillhub	↑
9	 Castalia	↓
10	 Nexer	↑

### Trend towards major cities

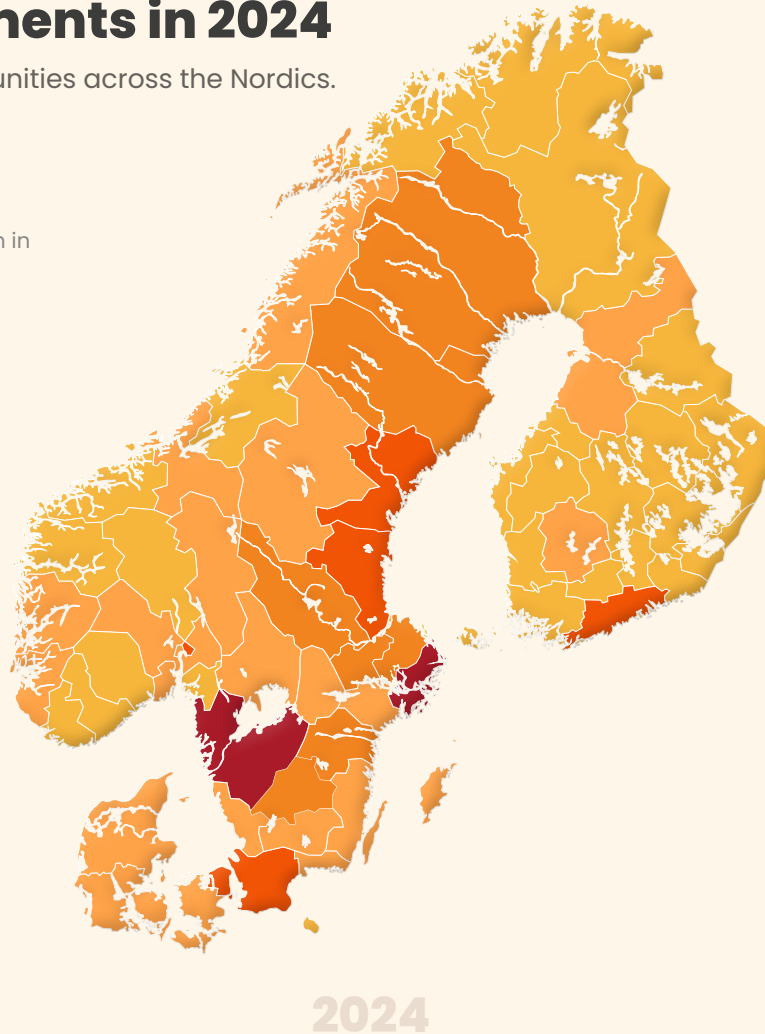
As the Brainville platform kept growing demand grew in the large metropolitan

areas in the Nordics in 2024, with the notable exception of Oslo that saw a slight dip, breaking the negative trend from previous years. On the other hand, Norway

led the way when it came to registrations by consultants on the Brainville platform, with an increase of more than 60 percent compared to 2023.

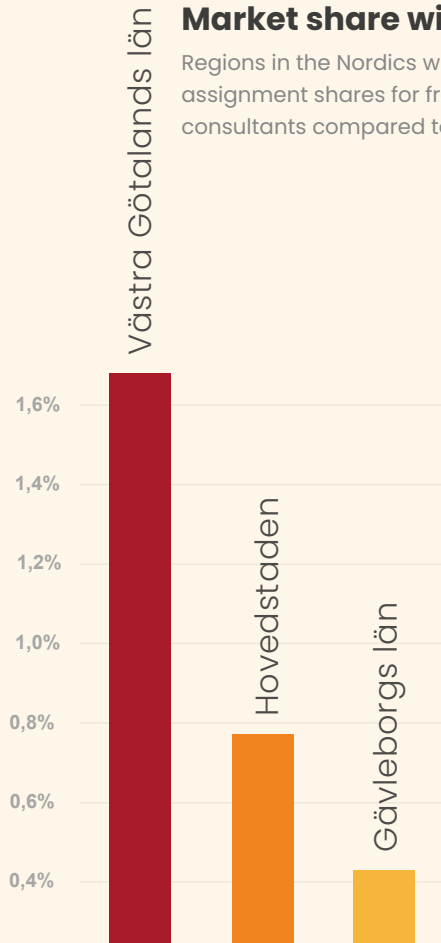
## Top regions for assignments in 2024

Heatmap of freelance and consultant opportunities across the Nordics.



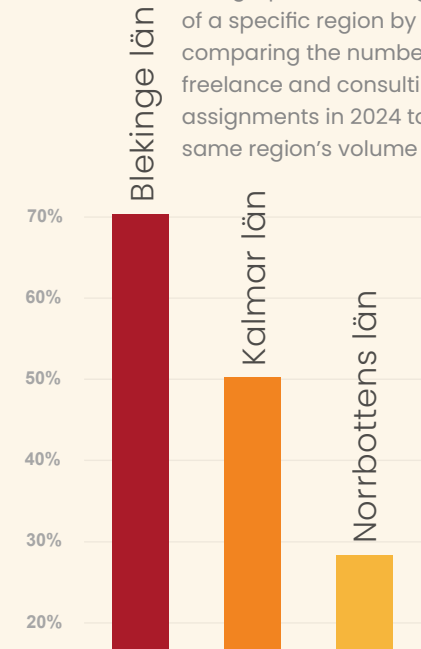
### Market share winners 2024

Regions in the Nordics with the highest growth in assignment shares for freelancers and consultants compared to 2023



### Fastest-growing regions in 2024

The graph shows the growth of a specific region by comparing the number of freelance and consulting assignments in 2024 to the same region's volume in 2023.





Not surprisingly, the residence of the consultants mirrored the demand with the highest concentration in the largest

metropolitan regions. The most entrepreneurial one was Stockholm with the highest density of registered companies on

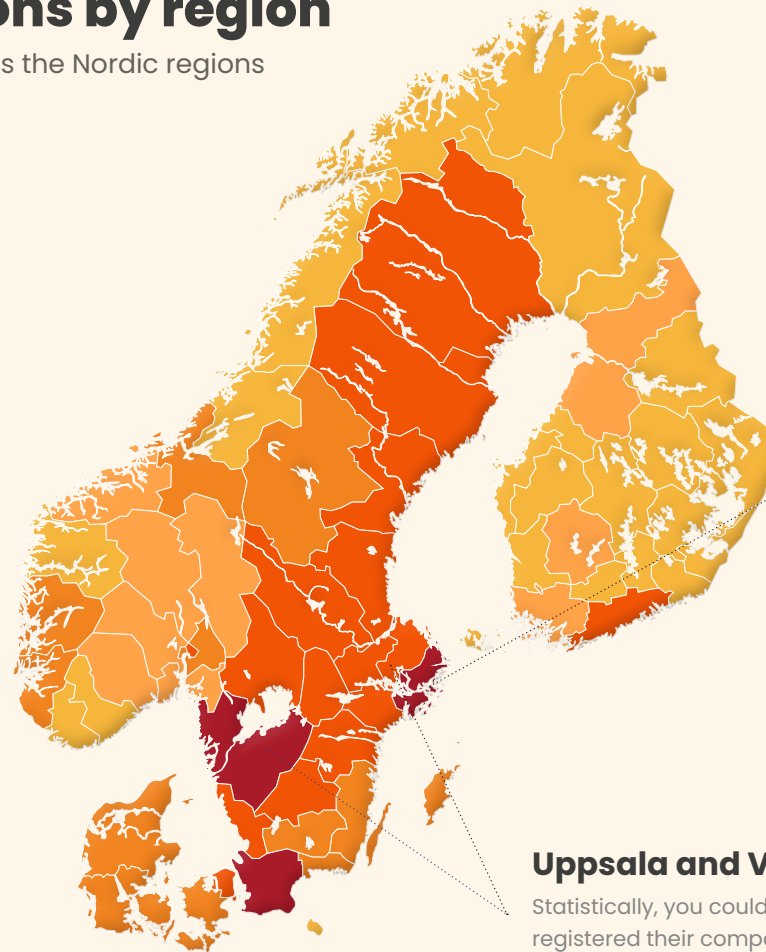
Brainville, one for every 229 residents.

## Company registrations by region

Heatmap of Brainville registrations across the Nordic regions

### Where are our companies based?

85% of the companies on Brainville have shared their registered location. The postal areas with the most entrepreneurs include Stockholm, Gothenburg, Malmö, Solna, Uppsala, Västerås, Lund, Oslo, Linköping, Täby, Bromma, Örebro, and more.



### Stockholm

One in every 229 people in Stockholm County has registered their company with us. Even more are users. Every time you enter a subway carriage you're likely to meet one or more of us!

### Uppsala and Västra Götaland

Statistically, you could spot at least one person who has registered their company with us every time you go to the movies in Uppsala or Västra Götaland counties.

2024

### Hybrid assignments on the rise

Hybrid assignments, allowing partially for remote work, are on the rise at the expense of assignments allowing completely remote work. This post-pandemic trend continued and did not seem to lose steam in 2024.

The combined share for the two forms remained stable with around one in five assignments offering the possibility of remote work to some extent. But the ongoing

shift in the mix between them meant that hybrid assignments accounted for around 80 percent of that share in 2024, compared to a 50/50 split just two years earlier.

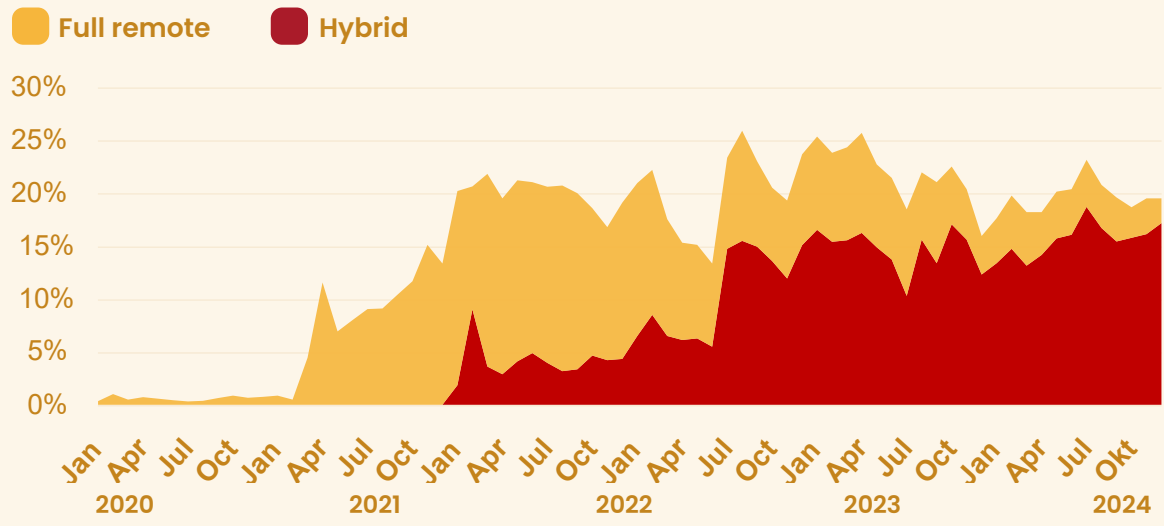
At the same time, the share of part-time assignments increased slightly from the already high level compared to previous years set in 2023, possibly establishing "a new normal".

Together with the share of self-employed and freelancers among the consultants

rapidly growing, these developments seem to underline the general trend towards demand for a higher level of flexibility from companies and consultants alike.

Explore [Brainville Statistics](#) for current rates and further insights on market trends.

### Remote work



### Buzzwords

Buzzwords are skills that appeared more frequently the last year, compared to the previous year.

- Generative artificial intelligence [↗](#)
- Gateway [↗](#)
- Microsoft Entra ID [↗](#)
- Firewall [↗](#)
- Network switch [↗](#)
- CANoe [↗](#)
- Local Interconnect Network [↗](#)
- SwiftUI [↗](#)
- Ada [↗](#)
- Mulesoft [↗](#)





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