brainville

Selective momentum, cautious market.

2025

2025 at a glance

All highlighted change values reflect year-on-year change (2025 vs 2024), unless otherwise stated.

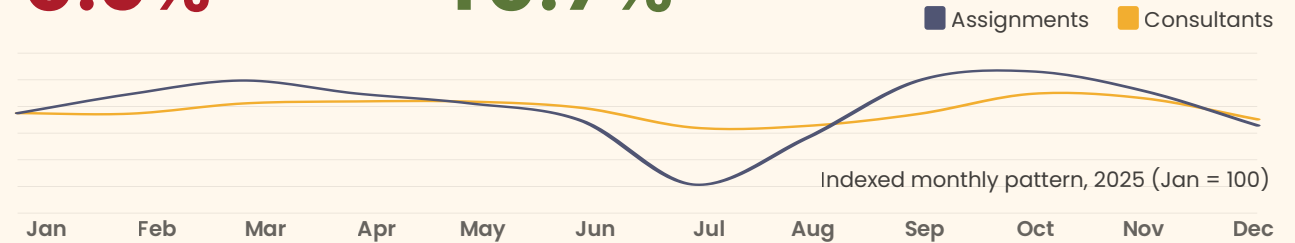## UNASSIGNMENT INDEX (BUI)

6.7% `-0.8pp`

BUI is an approximate **trend indicator** of consultant availability, based on observable activity on the Brainville platform. It should be interpreted as a trend indicator, not as an exact measure of unemployment.
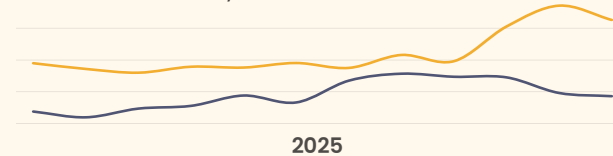
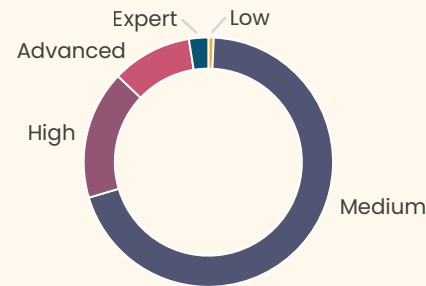## ASSIGNMENTS

-0.9%

CONSULTANTS

10.7%

■ Assignments   ■ Consultants

Indexed monthly pattern, 2025 (Jan = 100)

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

REMOTE WORK

31.3% `+11.9pp`

■ Full remote   ■ Hybrid

2025

COMPETENCE LEVEL

Continued shift toward higher seniority

Expert   Low
Advanced
High
Medium

BUYER RATE

-0.7%

SELLER RATE

+0.2%

Average hourly rates   ■ Buyer rate   ■ Seller rate
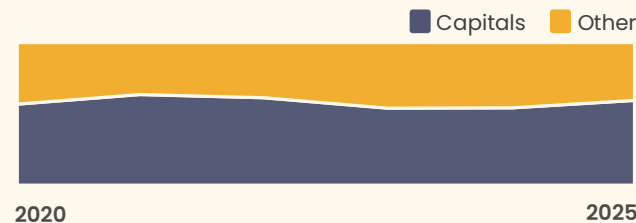
2020   2025
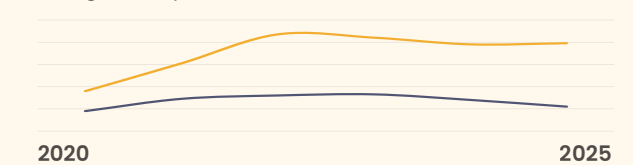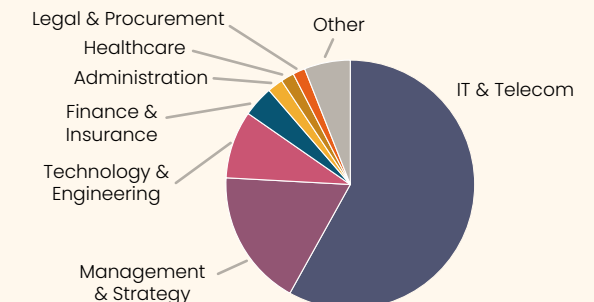
PART-TIME

10.2% `+3.0pp`

The share of assignments allowing part-time work continues to increase. In 2025, just over 10% of all assignments allow part-time engagement.

CAPITAL REGIONS VS OTHER REGIONS

Assignment volume over time.

■ Capitals   ■ Other

2020   2025

COMPETENCE AREA

Legal & Procurement
Healthcare
Administration
Finance & Insurance
Technology & Engineering
Management & Strategy
Other
IT & Telecom

brainville **2025**

A year of stability and selectiveness

Stability was one characteristic of the market in 2025. Demand and nominal prices both remained largely stable. A record number of consultants registered on Brainville, but a larger share were engaged in assignments at any given time.

However, another characteristic was selectiveness. Demand for more senior consultants and experts kept growing as companies pinpointed key competences and specific roles.

Brainville is the largest independent marketplace for freelancers and consultants in the Nordics. As an extension of 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 2025.

Year-on-year change in assignment volume by country (2025 vs 2024)

A high-level view of how assignment volumes developed across the Nordics and Poland in 2025. Each value represents the year-on-year change at country level.

Small declines in Sweden and Denmark, growth elsewhere – Finland stands out.

Highest growth in 2025

Sweden	Denmark	Norway	Finland	Poland
−1.9%	−2.8%	+2.3%	+20.1%	+3.5%
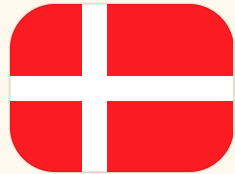
brainville **2025**

Continued stability but not without warning signs

By and large demand remained stable in 2025. The number of assignments on offer largely followed the seasonal pattern established in the last couple of years, with a strong start in the first six months followed by the usual seasonal drop later in the year.

While demand on the Swedish and Danish markets was essentially unchanged compared to 2024, there were positive signs in Norway and significant growth in Finland during the year, albeit from modest levels.

Set against a backdrop of a stable market, a couple of continuing trends during the year warned about tougher times for consultants.

One such factor was a new record number on advertisers. Simply put, more companies than ever before used the Brainville platform, but each of them on average had fewer assignments to offer. Another was the fact that demand for more experience and skill kept rising, building on the marked shift seen in 2024, with companies looking for more senior consultants at advanced or expert level. While this could be interpreted as a sign of better times ahead, with companies on the offense going for an expert, it also means that buyers to an increasing extent expect to have their pick among consultants which points to a weaker market.
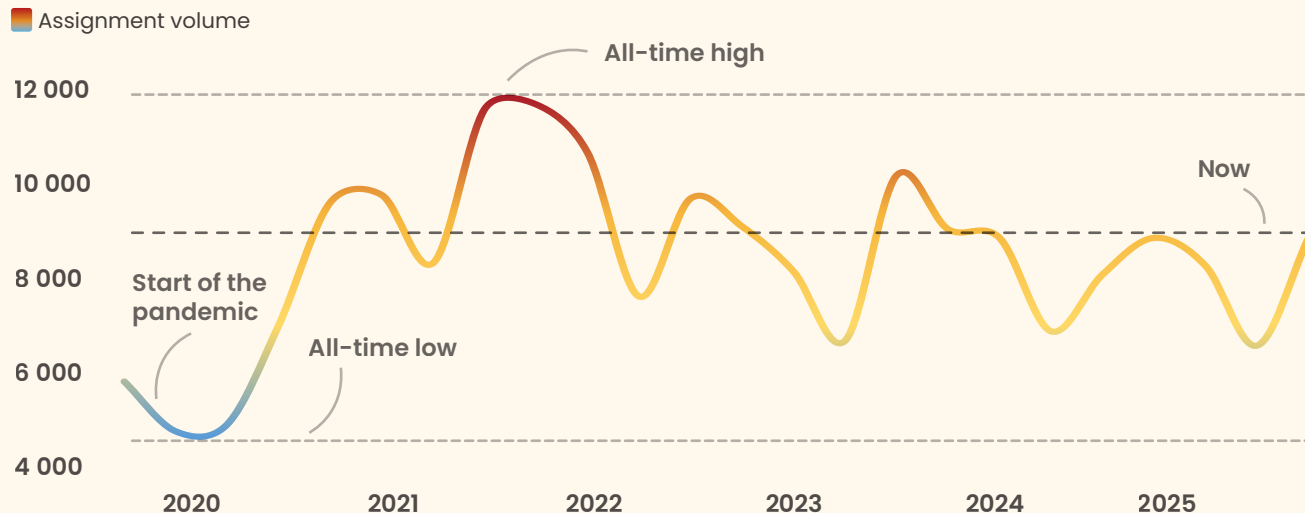
At the same time more and more consultants looked for work in 2025. The number of registrations on the Brainville platform kept rising, continuing the trend from the previous two years and setting a new all-time high. The share of freelancers among the consultants remained at high levels seen I the last couple of years while the share of self-employed continued to grow.

– Freelancing has become more socially accepted and practical, thanks to both digital tools and changing work culture, said Brainville CEO Manuel de Verdier adding:

– Many experienced consultants today choose to stand on their own two feet rather than belong to a larger company. It's all about freedom, control and financial potential – especially when platforms like Brainville make it easier to find assignments.

Assignment volume over time

Assignment volume

- 12 000
- 10 000
- 8 000
- 6 000
- 4 000

Start of the pandemic

All-time low

All-time high

Now

2020   2021   2022   2023   2024   2025

1.6% −0.4pp Compared to 2024

Duplicate assignments occur when multiple brokers work with the same end client. This is not uncommon and can benefit consultants by offering a choice of terms, relationships, and process.

brainville **2025**

Top assignment volume

Companies with the most freelance and consultant assignments.

1	Ework	—
2	Emagine	—
3	Upgraded People	—
4	Danir Development	↑
5	Consulting Collective	↑
6	AFRY	—
7	Chas Visual Management	↑
8	Finitec	↑
9	KeyMan	↑
10	Witted	↓

During the period 2020–2025, the share of assignments coming from advertisers outside the top 10 increased from 38% to over 46%. This is a clear indication that demand is increasingly driven by a broader base of buyers, rather than by a small number of dominant actors.

■ Top 10 buyers ■ All other buyers
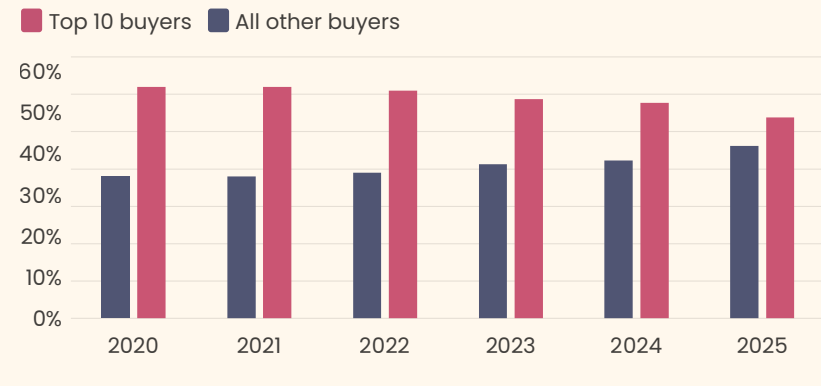
Activity Matters

Active advertisers contribute to a stronger and more efficient market. When many assignments are gathered in one place, it becomes easier for consultants to find the right opportunities — and for buyers to reach new expertise beyond their existing networks.

High advertising activity creates transparency, mobility, and better matching. It benefits specialists seeking assignments that align with their skills and ambitions, and organizations looking to secure the right competence faster. Active advertisers contribute not only volume, but long-term market vitality.

brainville 2025

Rates flat - matching all the more important

In spite of increased competition for assignments and other factors pointing to a weak market, consultant rates generally remained stable in 2025. Matching and selection appear to play an increasingly important role in managing demand, rather than pricing alone. On the other hand, the nordic markets have experienced relatively high inflation rates in recent years with consultants not managing to raise their rates accordingly. In fact, rates have dropped in real terms in the same period in many cases.
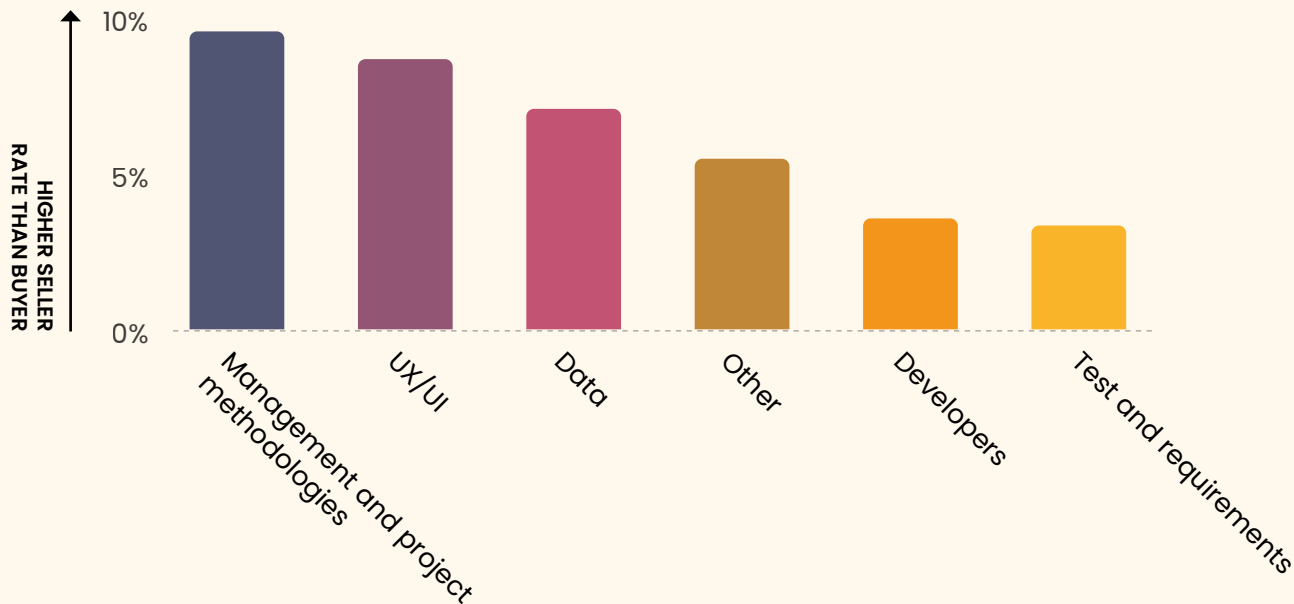
– If we look at the average hourly rate for the roles we track over time, we see that it has edged down since 2022. From 2024 to 2025, the average rate increased slightly but remains below earlier levels.

Buyers proved willing to increase their offers most notably for PHP developers and AI/ML consultants as well as for testers and technical testers. On the other hand, AI/ML consultants also dared raise their asking price more than other roles during the year, followed by data base analysts, requirements analysts, change managers and Java-developers. Meanwhile business analysts and product owners managed to maintain their rates despite being seeing a clear drop in demand for their respective roles during the year.

Buyer–seller rate difference by role group

HIGHER SELLER RATE THAN BUYER

Categories: Management and project methodologies, UX/UI, Data, Other, Developers, Test and requirements

Understanding the buyer–seller rate difference

The chart shows the percentage difference between average buyer and seller rates for some of the most frequently advertised role groups on Brainville. Seller rates are consistently higher than buyer rates, reflecting the natural price span between seller expectations and buyer budgets. The size of this difference varies across role groups, with the largest gap observed within Management & Strategy roles.

Beyond pricing differences

The pricing gap narrows as roles move from early decision-making towards execution. This observation is revisited later in the report, where role groups are used to examine how market activity tends to unfold over time.

brainville **2025**

Another all-time high as Brainville keeps growing

2025 proved to be yet another year when the number of available consultants kept growing. This was particularly clear in the first half of the year, a year which contained another new-all time high. The total number of available consultants was almost 11 percent higher in 2025 than the previous year.

However, our approximative "unassignment index", simply put the number of available consultants in relation to the total number of active consultants, actually fell towards the end of 2025, suggesting that the all-time high is the logical effect of the Brainville platform growing rather than reflecting a drop in market demand.

Demand continued to grow in Management & Strategy during the year, reflected for example in increased opportunities for project managers, while the Technology & Engineering sector remained relatively stable.

IT & Telecom, Brainville's largest sector by far, bounced back as demand increased in absolute numbers as well as relative to other sectors. The number of assignments on offer has not been greater since 2022. This was confirmed by increasing opportunities for system developers and database consultants.

It should not, however, be viewed as a boom in the IT market in a broader sense, but rather a recovery after two weaker years. Demand continues to shift towards technical implementation, platform, data and security. Roles linked to development, operations and system-related responsibilities are increasing, while more feasibility- and requirements-related roles are decreasing relatively. This indicates a market where the focus is on further developing, securing and streamlining existing solutions rather than initiating new ones.

Available consultants
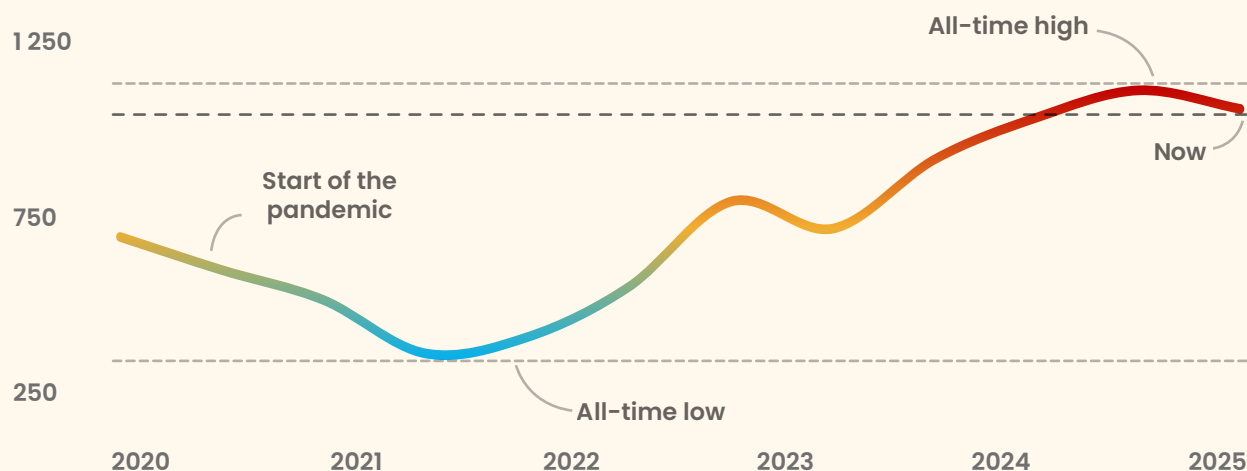
Umbrella contractors on Brainville

The number of umbrella contractors registered on Brainville has increased year by year. Growth is visible across several umbrella company models and countries, with a particularly clear acceleration from 2023 onward.

This development indicates a continued interest in flexible work arrangements, where consultants and freelancers choose employment via umbrella companies as an alternative to running their own limited company, while still operating on the assignment market.

+15.2%

Year-over-year increase in registered umbrella contractors (2024–2025).

brainville 2025

Demand gravitated towards the capital cities

Demand kept growing in the capital regions in the Nordics in 2025. Stockholm was the clear winner with a sharp increase, further underlining its dominant position. The capital regions in Norway and Finland also experienced clear growth during the year, while demand in the Copenhagen-region in Denmark largely remained stable. This reinforces a long-term pattern where both demand and consultant availability increasingly concentrate around capital regions, strengthening their role as market hubs.

Notably the other large metropolitan areas in Sweden lost ground as demand dropped significantly throughout the year, in relative terms as well as in absolute numbers.

Just like in previous years the concentration of demand went hand in hand with the residence of the consultants. As expected, Stockholm again had the highest density of registered consultants on Brainville, with one for every 178 residents, up from one for every 197 residents in 2024.

Top regions for assignments in 2025

Heatmap of freelance and consultant opportunities across the Nordics.

Oslo

Stable volumes around 6% of Nordic demand. One consulting company per 998 residents.

Hallands län

Relatively small in volume — but one consulting company for every 575 residents.

Nordjylland

Assignments up more than 60% compared to earlier periods — from relatively low levels.
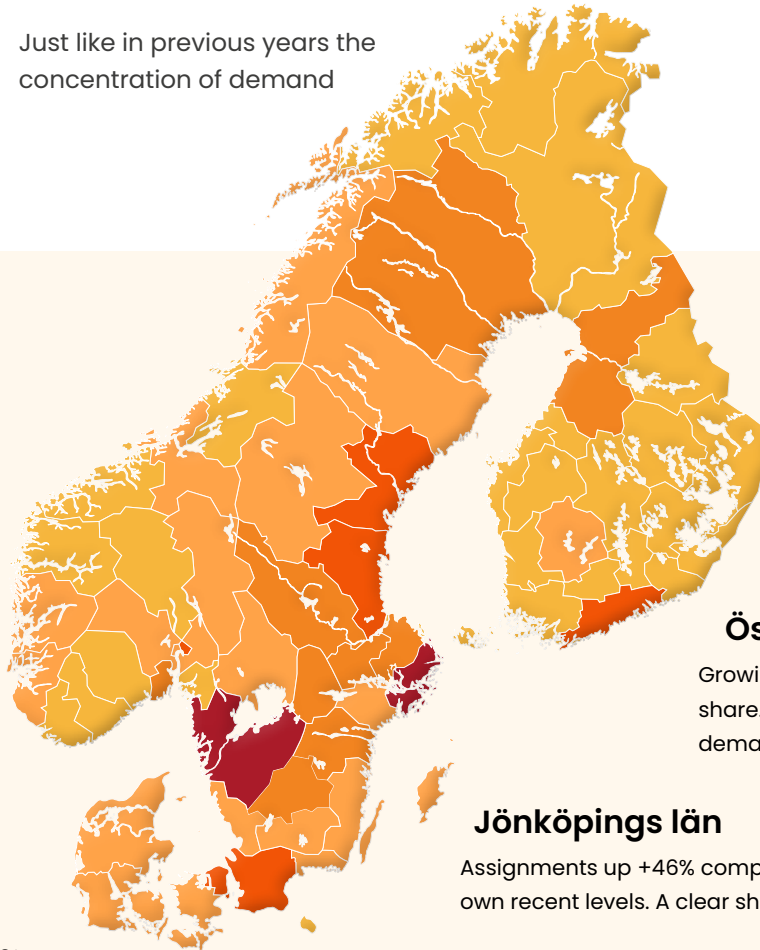
Uusimaa

Assignment share increasing to over 4.5% of the Nordic market. Steadily gaining ground.

Uppsala län

Assignment volumes up +16% compared to previous periods. One company per 403 residents.

Östergötlands län

Growing volumes and a rising market share. Now close to 3% of total Nordic demand.

Jönköpings län

Assignments up +46% compared to its own recent levels. A clear shift in activity.

brainville **2025**

Hybrid no longer an exception

The overall picture is clear: Remote work has moved from exception to expectation. Hybrid assignments, allowing partially for remote work, have become a normal feature on the consulting market. However, the number of fully remote assignments remains limited.

This is a mix that is completely in line with the on-going trend since the pandemic years, which continued to manifest itself in 2025.

In much the same way, part-time assignments have gone from being a marginal phenomenon to a well-established part of the market, another sign of the acceptance of more flexible assignment forms. The share of part-time assignments has more than doubled in only a few of years and increased significantly again during 2025, making it a change that is likely to persist.

Work models by country

■ Hybrid ■ Fully remote ■ On-site

🇸🇪 Sweden
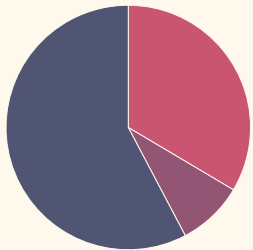
Mix of on-site, hybrid and fully remote assignments.

🇩🇰 Denmark

On-site assignments remain the largest share.

🇳🇴 Norway

Hybrid and on-site dominate the distribution.

🇫🇮 Finland

All three work models are represented.

🇵🇱 Poland

Fully remote assignments account for a large share.

brainville **2025**

Early signals of new project activity?

Forward-looking roles as early indicators – how we interpret the consulting market.
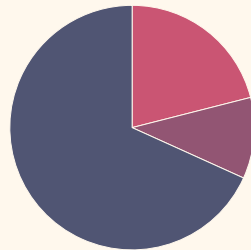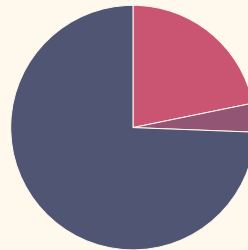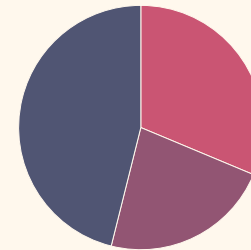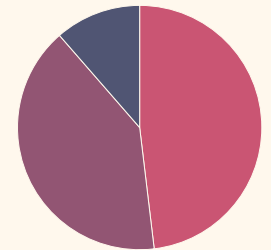
When analysing the consulting market, we are often asked:

When does it turn? Are there early signs that new projects are coming?

There are no simple answers. However, our data shows recurring patterns.

Traditionally, the project manager role has often been viewed as a possible leading indicator. But the role has clear limitations: project managers are brought in not only when projects start, but also when they are being wrapped up.

We have therefore broadened the perspective and analysed multiple role groups to see whether some tend to move earlier than others.

The purpose is not to predict outcomes, but to better understand the order in which change often unfolds.

Projects evolve in stages

Projects rarely start fully staffed. Instead, they tend to build up in phases, with different roles entering at different points.

Based on this assumption, we group roles into three broad categories.

Forward-looking roles

Early project phase

Roles involved when projects are initiated, shaped and decided.

- Project & Change Managers
- Product Owners / Product Managers
- UX & Service Designers
- Business & Requirements Analysts

Improving roles

Project takes shape

Roles added once a project is approved and content is defined.

- Data roles (Data Engineers, Data Scientists, etc.)
- BI consultants
- AI- and ML-related roles
- Integration roles

Operational roles

Execution & scaling

Roles primarily needed during delivery, scaling and operations.

- Developers and Testers
- DevOps
- Security-related roles
- Operations and Support

This categorisation is an analytical tool. Some roles may span more than one group depending on the assignment.

brainville 2025

An analytical tool – not a crystal ball

This approach is not a forecasting instrument. Relationships are not mechanical, and external factors can quickly change the picture. The analysis is intended to support interpretation, not provide definitive answers.

What does the last half-year suggest about H1 2026?

The chart below illustrates periods where this pattern has been most clearly observed in practice. Towards the end of 2025, forward-looking roles show no clear strengthening. Historically, this has often coincided with periods where new project activity emerged slowly.

If the pattern holds, H1 2026 may remain cautious rather than marking the start of a broad recovery.

That said, this is an interpretation – not a forecast.

In closing

We share this analysis because it adds a perspective often missing from traditional market statistics. Not because it is perfect, but because it can help us better understand how change tends to take shape in the consulting market.

If you have views on the roles, the method or the interpretation, we would love to hear from you.

Early signal graph

■ Forward-looking roles   ■ Improving roles   ■ Operational roles

How we analysed the data

- Half-year data to reduce noise and seasonal effects
- Each role group indexed to its own historical peak (index = 100)
- Focus on timing and sequence, not absolute volumes
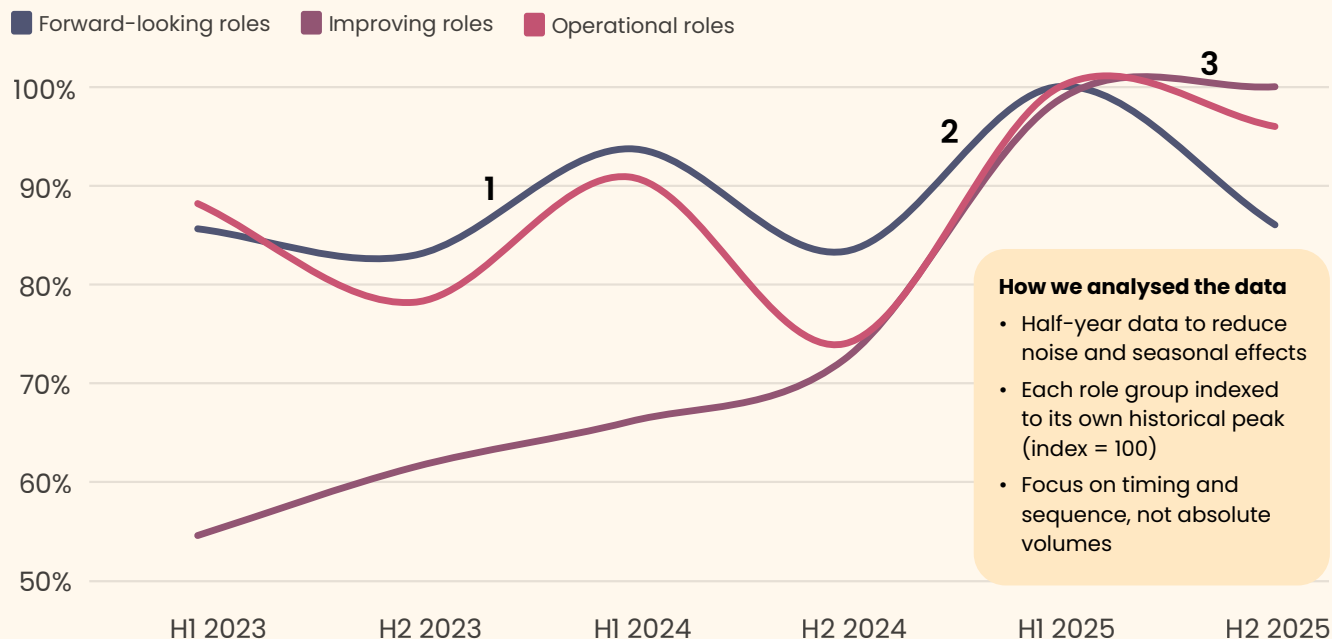
Periods where the pattern is most visible

1. The upswing from H2 2023 to H1 2024

Forward-looking roles strengthen first, followed by improving roles and then operational roles. This occurs during a period without major external disruptions.

2. The acceleration ahead of H1 2025

A similar pattern appears, but at a faster pace. Forward-looking roles move earlier and level off sooner, while improving and operational roles continue to strengthen for longer.

3. When the pattern weakens during 2025

Later in 2025, the role groups move more in parallel. At this stage, many projects are already in execution, making differences between groups less pronounced.

Historically, when both forward-looking and improving roles strengthen at the same time, broader demand for operational roles often follows.

brainville 2025

Introducing BPMI

Reading market momentum before it shows up

For years, project managers have been treated as an early signal of where the consulting market is heading. When demand for project managers rises, new initiatives are assumed to be forming.

But as an indicator, it has always been imperfect. Project managers appear at different stages of a project lifecycle — sometimes early, sometimes much later, when scope needs to be stabilised or delivery brought back on track. As a result, demand for project managers reflects activity in the market, but not always early activity.

If we want to understand where the market is moving right now — not months from now — we need to look wider.

That is the motivation behind the Brainville Project Momentum Index (BPMI).

BPMI aims to capture how actively the project market is forming before outcomes become visible in traditional market data. It does not forecast the future. It focuses on direction and intensity in the present.

What BPMI tries to capture

BPMI builds on the idea of forward-looking roles: roles that tend to appear early when new initiatives take shape, even before projects are fully defined or staffed.

Rather than relying on a single role, BPMI groups early-stage signals to capture broader patterns that emerge when organisations begin to move — cautiously or decisively.

The index is calculated per half-year and is designed to reflect momentum rather than volume.

How BPMI is constructed

BPMI combines three components, each capturing a different aspect of early project activity:

Weight 40%

Project start

A proxy for early-stage initiation, based on demand patterns that typically appear when new initiatives begin.

Weight 35%

Staffing friction

How easily initiatives gain traction, measured through assignments receiving few or no applications. Rising friction often signals higher selectivity, skill mismatches or tighter requirements — not necessarily weaker demand.

Weight 25%

Ambition level

How demanding projects are, reflected in scope, complexity and seniority requirements.

All components are normalised to a historical 0–100 scale and combined into a single index.

brainville 2025

BPMI in the context of 2025

Looking at full-year data, BPMI shows a market that built momentum during the first half of 2025, followed by a more cautious and stabilising second half.

New initiatives continued to form, but elevated staffing friction slowed the pace at which activity could increase, even in a market with historically high consultant availability.

Higher expectations and narrower role definitions continued to limit effective matching. Activity did not reverse — it slowed and stabilised.

The pattern points to continued activity under more selective and demanding conditions.

Reading signals into H1 2026 (Not a forecast)

Entering H1 2026, BPMI points to a market that remains cautious but active.

Forward-looking roles are still elevated compared to historical levels, though slightly lower than in H1 2025. Ambition signals remain high, while staffing friction stays elevated.

Taken together, this suggests a market that is preparing rather than accelerating, where future movement is more likely to be unlocked by improved matching conditions than by increased volume.

This should be read as a directional interpretation of observed behaviour, not as a forecast.

Why BPMI is still evolving

BPMI is new and intentionally transparent.

We believe there is value in trying to read market momentum earlier and more precisely than traditional indicators allow — while recognising that the model will continue to improve over time.

That is why BPMI is a work in progress, and why feedback and alternative interpretations are not just welcome, but essential.

BPMI Chart

■ BPMI
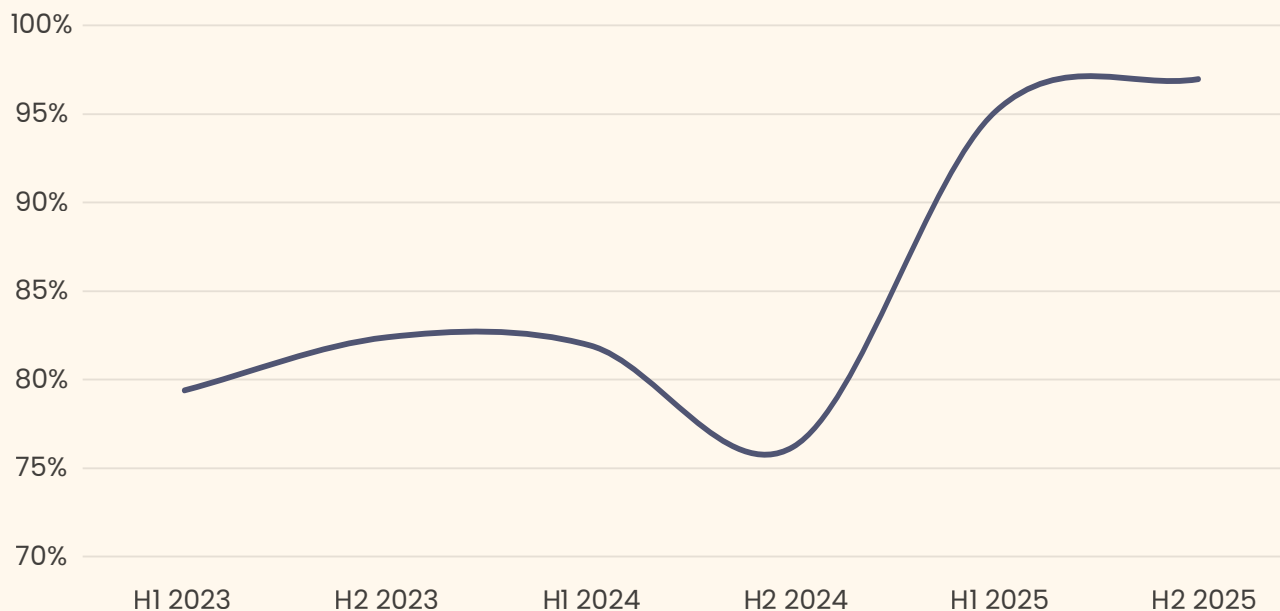
How to read BPMI (and how not to)

BPMI measures momentum rather than outcomes or volume.

A high index does not imply low competition, and elevated staffing friction does not automatically signal weaker demand. In many cases, it reflects higher expectations, narrower role definitions or more deliberate buying behaviour.

Individual roles should therefore be interpreted as part of a broader pattern, not in isolation.

brainville **2025**

Top reply frequency

Companies most responsive to applications
from freelancers and consultants.

1		Tingent	↑
1		Specify IT Stockholm	━
1		AQC Sweden	↑
1		Uppdraget	↑
5		Gansa AB	↑
6		EDGE Associates	↑
7		Leoware Sverige	↑
8		SwedQ	↑
9		Kantur & Associates	↑
10		Iceberry	↓

Responsiveness Matters

Providing feedback to applicants is a cornerstone of a professional assignment market. Consultants expect responses — not necessarily a positive one, but clarity. This enables them to make informed decisions, prioritize correctly, and plan their availability.

A high response rate signals respect, structure, and long-term commitment. It builds trust and strengthens relationships between buyers and suppliers. Advertisers who consistently respond are perceived as reliable and attractive partners over time.

brainville **2025**

Market Pressure

Market pressure measures competition for a role by comparing consultant availability with application intensity.

Application Pressure   HIGH   **Highly Competetive**

.NET Developer

JavaScript Developer   Frontend Developer   Product Manager

PHP Developer

Fullstack Developer

AI/ML   Backend Developer

Java Developer   C Developer   UI Designer

UX Designer

Data Engineer   Data Scientist   Scrum Master

Python Developer   Technical Tester   Technical Lead   Agile Coach

Test Automator   BI Consultant   Data Analyst

C++ Developer   DevOps   Project Manager

Embedded Developer

Tester   Business Analyst

LOW ─── HIGH

System Technician   Requirements Analyst   Database Developer

UX Researcher

Server-/Virtualization specialist   Change Manager

IT Support   Product Owner

IT Security Specialist   Android Developer

System Integrator   Business Developer

Test Manager

Cloud Consultant   Team Leader

iOS Developer

DBA   Solution Architect

System Architect   Technical Project Manager

Application Expert

System Administrator

Balanced   LOW   **Supply Pressure**

brainville **2025**

How to read the rates

The rate lists that follow reflect how the consulting market appears on Brainville, based on actual market activity rather than stated price lists or survey responses.

The analysis is based on approximately 35,000 published assignments and their associated applications, derived from actual market activity on the Brainville marketplace.

Country coverage

At present, detailed role-level rate statistics are shown for Sweden, where data volumes are sufficient to support robust and reliable comparisons.

For other countries, underlying volumes are currently too limited to present role-level pricing with the same level of confidence.

Assignment duration and rate levels

On Brainville, most published assignments are long-term in nature, with an average duration of around 240 days. Hourly rates for long-term engagements are typically lower than for short, ad-hoc assignments, as they offer higher continuity, lower risk, and more predictable utilization for consultants.

These figures should therefore be understood as market averages for long-term consulting assignments, rather than benchmarks for short-term or highly specialized engagements.

Buyer and seller rates

In this context, the seller rate represents the average hourly rate requested by consultants, while the buyer rate represents the average hourly rate offered by buyers.

Any difference between the two reflects prevailing market dynamics and competition, rather than negotiated outcomes in individual assignments.

Market pressure

This measure describes the level of competition for assignments within a role, based on the relationship between consultant availability and application intensity.

Higher market pressure indicates stronger competition for assignments, while lower pressure suggests a less competitive market.

Assignment share

Here, the metric shows how large a share of all published assignments a role represents.

It serves as an indicator of relative demand between roles, not absolute volume.

brainville 2025

Management and project methodologies

ROLE	ASSIGNMENT SHARE	Δ 2024	SELLER RATE	Δ 2024	BUYER RATE	Δ 2024	MARKET PRESSURE
Project Manager	11.6%	↑ 0.2%	999 kr	↑ 18 kr	858 kr	↓ -47 kr	Highly Competitive
Technical Project Manager	2.2%	↑ 0.3%	973 kr	↑ 11 kr	887 kr	↑ 3 kr	Supply Pressure
Business Analyst	1.7%	↓ -0.5%	932 kr	↑ 1 kr	840 kr	↓ -16 kr	Highly Competitive
Agile Coach	1.3%	↑ 0.1%	985 kr	↓ -35 kr	908 kr	↑ 17 kr	Highly Competitive
Change Manager	1.2%	↑ 0.4%	1 048 kr	↑ 26 kr	914 kr	↓ -5 kr	Supply Pressure
Scrum Master	1.0%	↑ 0.2%	912 kr	↑ 12 kr	845 kr	↓ -28 kr	Highly Competitive
Product Owner	0.9%	↓ -0.1%	961 kr	↓ -2 kr	854 kr	↓ -47 kr	Supply Pressure
Business Developer	0.9%	↑ 0.1%	1 022 kr	↓ -21 kr	912 kr	↑ 17 kr	Supply Pressure
Technical Lead	0.8%	↑ 0.1%	955 kr	↑ 9 kr	896 kr	↓ -9 kr	Highly Competitive
Team Leader	0.5%	↑ 0.2%	963 kr	↑ 3 kr	869 kr	↓ -1 kr	Supply Pressure
Product Manager	0.4%	→ 0%	990 kr	↓ -7 kr	899 kr	↓ -44 kr	Highly Competitive

Assignment share – Share of total published assignments per role.

Δ 2024 – Change compared to 2024.

Seller rate – Average hourly rate requested by consultants.

Buyer rate – Average hourly rate offered by buyers.

Market pressure – Relative competition for assignments.

brainville **2025**

Developer roles

ROLE	ASSIGNMENT SHARE	Δ 2024	SELLER RATE	Δ 2024	BUYER RATE	Δ 2024	MARKET PRESSURE
Java Developer	4.6%	↑ 0.8%	855 kr	↑ 21 kr	806 kr	↓ -10 kr	Application Pressure
.NET Developer	4.3%	↑ 1.1%	861 kr	↑ 9 kr	803 kr	↓ -9 kr	Application Pressure
JavaScript Developer	2.1%	↓ -0.7%	845 kr	↑ 17 kr	837 kr	↑ 24 kr	Highly Competitive
AI/ML	1.6%	↑ 0.6%	956 kr	↑ 44 kr	914 kr	↑ 39 kr	Application Pressure
Python Developer	1.3%	→ 0%	848 kr	↑ 3 kr	822 kr	↑ 3 kr	Application Pressure
C++ Developer	1.2%	→ 0%	865 kr	↑ 18 kr	811 kr	↑ 3 kr	Application Pressure
Android Developer	0.8%	↑ 0.1%	864 kr	↑ 19 kr	832 kr	↓ -17 kr	Balanced
C Developer	0.5%	→ 0%	826 kr	↓ -25 kr	736 kr	↓ -42 kr	Application Pressure
iOS Developer	0.5%	→ 0%	844 kr	↓ -2 kr	824 kr	↓ -6 kr	Balanced
PHP Developer	0.1%	→ 0%	835 kr	↑ 19 kr	886 kr	↑ 78 kr	Highly Competitive
Fullstack Developer	3.1%	↑ 0.3%	849 kr	↑ 12 kr	820 kr	↑ 1 kr	Highly Competitive
System Architect	2.7%	↑ 0.3%	968 kr	↑ 36 kr	905 kr	↑ 3 kr	Balanced
Backend Developer	2.4%	↑ 0.6%	851 kr	↑ 1 kr	811 kr	↓ -3 kr	Highly Competitive
Frontend Developer	1.9%	→ 0%	826 kr	↑ 13 kr	816 kr	↑ 12 kr	Highly Competitive
System Integrator	1.5%	↑ 0.5%	895 kr	↑ -2 kr	832 kr	↓ -14 kr	Balanced
Embedded Developer	1.3%	↑ 0.3%	840 kr	↑ 16 kr	817 kr	↓ -19 kr	Application Pressure

DEVELOPER LANGUAGE

DEVELOPER STACK

UX/Test/Data roles

ROLE	ASSIGNMENT SHARE	Δ 2024	SELLER RATE	Δ 2024	BUYER RATE	Δ 2024	MARKET PRESSURE	
UX Designer	1.3%	→ 0%	828 kr	↓ -8 kr	784 kr	↓ -4 kr	Highly Competitive	UX
UI Designer	0.4%	↑ 0.1%	818 kr	↓ -29 kr	714 kr	↓ -99 kr	Highly Competitive	
Tester	2.3%	↑ 0.1%	819 kr	↓ -3 kr	798 kr	↑ 24 kr	Application Pressure	
Test Manager	1.8%	↑ 0.1%	871 kr	↓ -19 kr	854 kr	↑ 7 kr	Balanced	
Requirement Analyst	1.3%	↑ 0.5%	942 kr	↑ 27 kr	830 kr	↓ -28 kr	Balanced	TEST
Test Automator	0.6%	→ 0%	839 kr	↓ -1 kr	829 kr	↓ -14 kr	Application Pressure	
Technical Tester	0.3%	↑ 0.1%	842 kr	↑ 5 kr	838 kr	↑ 34 kr	Highly Competitive	
Data Engineer	2.6%	↑ 0.9%	894 kr	↓ 3 kr	863 kr	↑ 18 kr	Application Pressure	
BI Consultant	1.5%	↑ 0.2%	956 kr	↓ -6 kr	860 kr	↑ 13 kr	Highly Competitive	
Data Analyst	1.1%	↑ 0.3%	922 kr	↑ 10 kr	823 kr	↓ -47 kr	Highly Competitive	DATA
Data Scientist	0.5%	↓ -0.1%	914 kr	↓ -28 kr	853 kr	↓ -21 kr	Highly Competitive	
DBA	0.4%	↑ 0.2%	920 kr	↑ 30 kr	852 kr	↓ -3 kr	Balanced	
Database Developer	0.4%	→ 0%	897 kr	↑ 3 kr	844 kr	↓ -32 kr	Supply Pressure	

brainville 2025

Other roles

ROLE	ASSIGNMENT SHARE	Δ 2024	SELLER RATE	Δ 2024	BUYER RATE	Δ 2024	MARKET PRESSURE
Application Expert	3.2%	↑ 1.4%	907 kr	↓ -12 kr	870 kr	↓ -3 kr	Balanced
Solution Architect	3.0%	↑ 0.2%	1 036 kr	↑ 45 kr	892 kr	↓ -4 kr	Balanced
DevOps	2.6%	↑ 0.4%	885 kr	↑ 2 kr	878 kr	↑ 26 kr	Application Pressure
IT Security Specialist	2.5%	↑ 0.8%	1 001 kr	↓ -95 kr	896 kr	↓ -10 kr	Balanced
Systems Technician	1.6%	↑ 0.3%	860 kr	↑ 10 kr	814 kr	↓ -12 kr	Balanced
Cloud Consultant	0.8%	↓ -0.1%	895 kr	↓ -2 kr	859 kr	↓ -1 kr	Supply Pressure
IT Support	0.8%	↑ 0.2%	696 kr	↓ -35 kr	727 kr	↓ -12 kr	Balanced
System Administrator	0.6%	↑ 0.1%	858 kr	↓ -22 kr	826 kr	↑ 12 kr	Supply Pressure
Server-/virtualization Specialist	0.4%	→ 0%	899 kr	↓ -23 kr	823 kr	↑ 3 kr	Balanced

Consultant rates lag behind inflation and wage growth

On paper, consultant rates look stable.

Since 2020, the average hourly seller rate for several of the most common roles on Brainville has barely moved. In nominal terms, that can seem reassuring. But once inflation and wage growth are taken into account, a different picture emerges.

In 2025, the average seller rate (simple average across our most frequently advertised roles) stands at around SEK 899 per hour.

To retain the same purchasing power as in 2020, that rate would need to be closer to SEK 1,080. To keep up with general wage growth, it would need to be around SEK 1,000.

Put differently, today's consultant rates are, on average:

- about 17% below inflation

- and roughly 10% below overall wage growth

For context, the buyer side tells a similar story. The average buyer rate for the same roles has increased only marginally since 2020 — from SEK 838 to SEK 842 per hour in 2025. In other words, prices on both sides of the market have been effectively flat in nominal terms, and clearly negative in real terms.

Meanwhile, expectations have moved in the opposite direction. Requirements for seniority and experience have increased, and competition for assignments has intensified.

Higher demands. Tougher competition. Lower real pay.

You do the math.

Rate inflation

Legend: Average rate · Salaries index · Inflation index

Rates vs inflation and wages

2025 compared to	2020	2024
Average Seller Rate	+5.0%	+0.1%
Average Buyer Rate	+0.5%	-0.7%
Average salary growth (SCB)	+16.7%	+3.5%
Consumer price inflation (SCB)	+26.1%	+2.7%
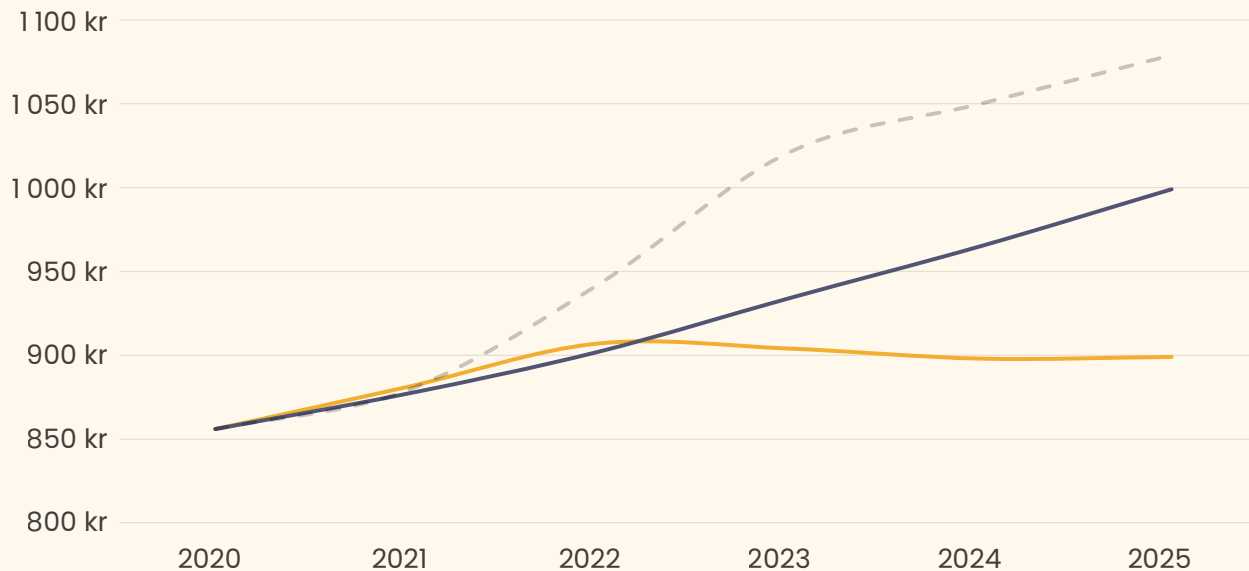
Disclaimer: This analysis is based on average hourly rates for a selection of commonly measured roles on the Brainville platform. Outcomes vary significantly between roles and individual assignments, and the figures should be interpreted as an overall market trend rather than a precise benchmark for individual consultants.

brainville **2025**

Competence areas on Brainville – demand vs. supply

To understand how Brainville's company base aligns with assignment demand, we analyse competence areas using a weighted distribution, where supply (companies) and demand (assignments) are compared based on their actual market share rather than simple counts.
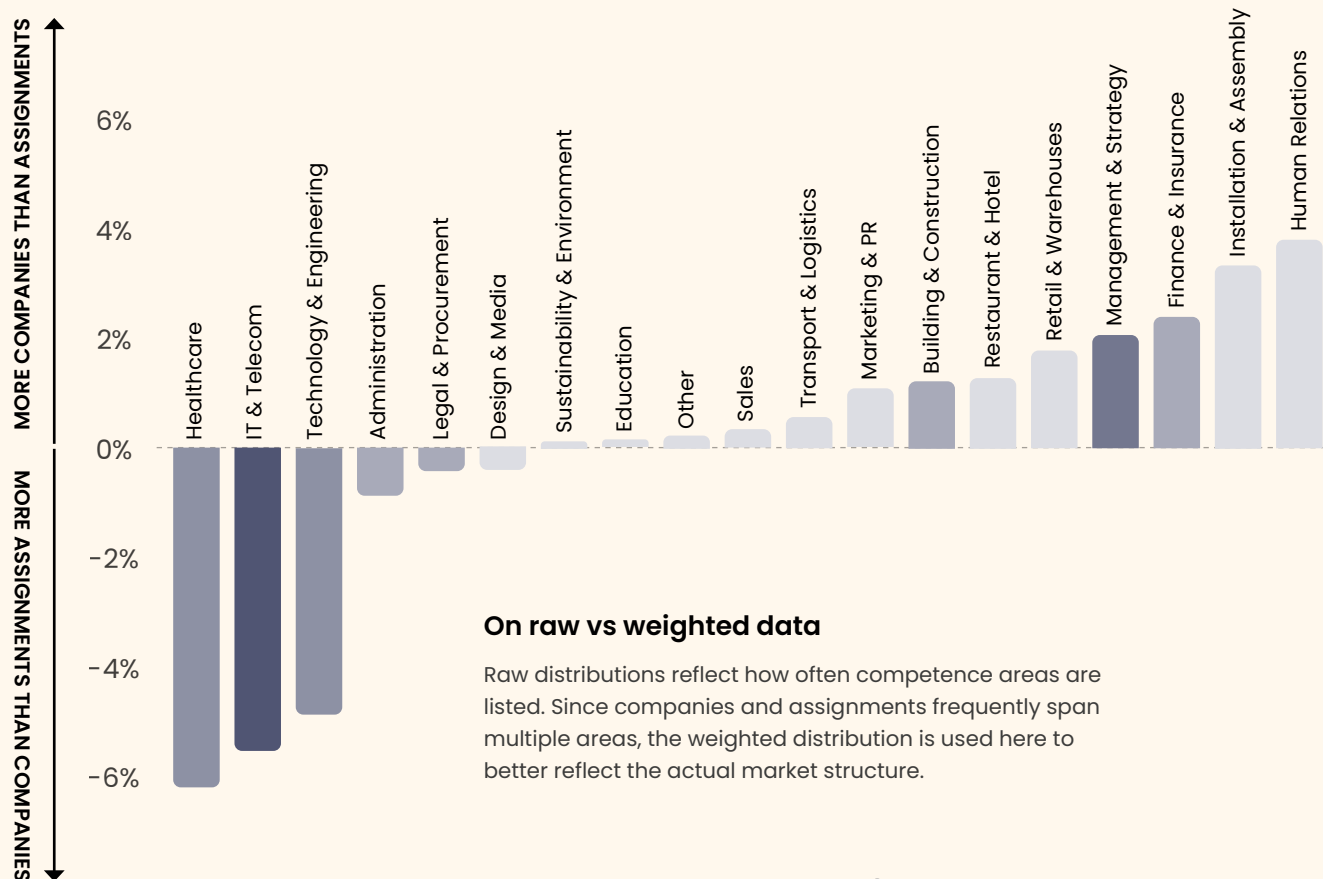
What does the weighted analysis show?

The visualization shows the difference between the weighted share of assignments and the weighted share of companies per competence area.

Bars represent this difference. A positive bar indicates relatively higher demand than supply, while a negative bar indicates the opposite.

Color intensity indicates each area's weighted share of total assignments, providing context on relative market size without affecting the balance measure itself.

MORE COMPANIES THAN ASSIGNMENTS

MORE ASSIGNMENTS THAN COMPANIES

Chart categories (left to right): Healthcare, IT & Telecom, Technology & Engineering, Administration, Legal & Procurement, Design & Media, Sustainability & Environment, Education, Other, Sales, Transport & Logistics, Marketing & PR, Building & Construction, Restaurant & Hotel, Retail & Warehouses, Management & Strategy, Finance & Insurance, Installation & Assembly, Human Relations

Y-axis: 6%, 4%, 2%, 0%, -2%, -4%, -6%

On raw vs weighted data

Raw distributions reflect how often competence areas are listed. Since companies and assignments frequently span multiple areas, the weighted distribution is used here to better reflect the actual market structure.

Shortage of assignments

In other competence areas, the weighted share of companies exceeds the share of assignments. This results in increased competition among suppliers, while buyers looking for this type of competence are generally well positioned to find available resources.

Balance

Some areas are close to balance between assignments and companies. Management & Strategy is one such example, suggesting a relatively mature and stable market.

Shortage of companies

In several competence areas, the weighted share of assignments exceeds the share of companies, indicating demand pressure. IT & Telecom is a clear example, where this pattern appears even in Brainville's largest competence area, pointing to continued structural demand for certain skills.

brainville **2025**

Top assignment quality

Companies with the most detailed
assignments for freelancers and consultants.

1	EDGE Associates	—
2	Avenit Consulting	↑
3	Nexer	↑
4	The Stellar Collective	↑
5	SwedQ	↑
6	Castra Group	↑
7	Magnit	↑
8	Accuro	↓
9	Techvision Consulting	↑
10	Hire Quality	↑

Clarity Matters

Clear assignments lead to better matches. When the role, scope, requirements, timing, and location are well defined, it becomes easier for the right consultants to recognize a good fit — and for others to opt out.

High ad quality saves time for everyone and results in more relevant applications. It signals professionalism and consideration, creating confidence from the very first interaction. A well-crafted assignment is often the starting point for a successful collaboration.

30%

Nearly 30% of all assignments now require high, advanced or expert-level competence. This coincides with a rise in part-time assignments, pointing to a more selective and experience-driven demand.

brainville 2025

When Demand Is Equal, Attention Isn't

Two roles can show similar demand, yet behave very differently on an open marketplace. One attracts attention and browsing, while the other is quietly filled — sometimes with far less noise, despite comparable demand.

To understand this difference, we look at visibility.

We measure attention through unique views per assignment. Views reflect curiosity and browsing behaviour — not competition. Actual competition is better assessed through applications per assignment.

To put visibility into context, we compare each role's share of total views with its share of published assignments. Roles that attract more views than assignments over-index, while those that attract fewer under-index.

What this means

Clearly defined roles with a broad, familiar audience tend to attract more views. For instance, developer roles are easy to recognise, easy to search for, and easy to compare across assignments, which naturally drives browsing and visibility.

Roles that are more system-, process- or domain-specific require deeper context. They are typically explored by a narrower audience, where candidates apply more deliberately rather than browse multiple listings.

As a result, clearly defined roles attract more attention — even when underlying demand is similar.

Top 5 over-indexing roles

1. Frontend Developer
2. .NET Developer
3. JavaScript Developer
4. Fullstack Developer
5. Backend Developer

Top 5 under-indexing roles

1. SAP Consultant
2. Application Expert
3. Buyer / Procurement Specialist
4. Operations / Infrastructure roles
5. Accounting / Finance roles

brainville **2025**

Which AI roles are actually in demand?

Which AI roles are actually in demand?

After our latest report, one question stood out more than any other: What do you really mean by AI consultant – and what kinds of AI roles are companies actually looking for? The interest is easy to understand. "AI" has become a broad label, covering everything from classical machine learning to generative AI, platforms, architecture, and governance.

To make this more concrete, we examined how different types of AI work are represented in today's assignment market.

How we did it

The analysis includes only assignments that have been actively classified by the advertiser as AI or ML roles. Each assignment was mapped to a single AI sub-role based on the assignment title and established market terminology.

The sub-roles used (such as AI/ML Engineer, GenAI specialist, MLOps, or AI Architect) are analytical groupings, not role categories currently used on the Brainville platform.
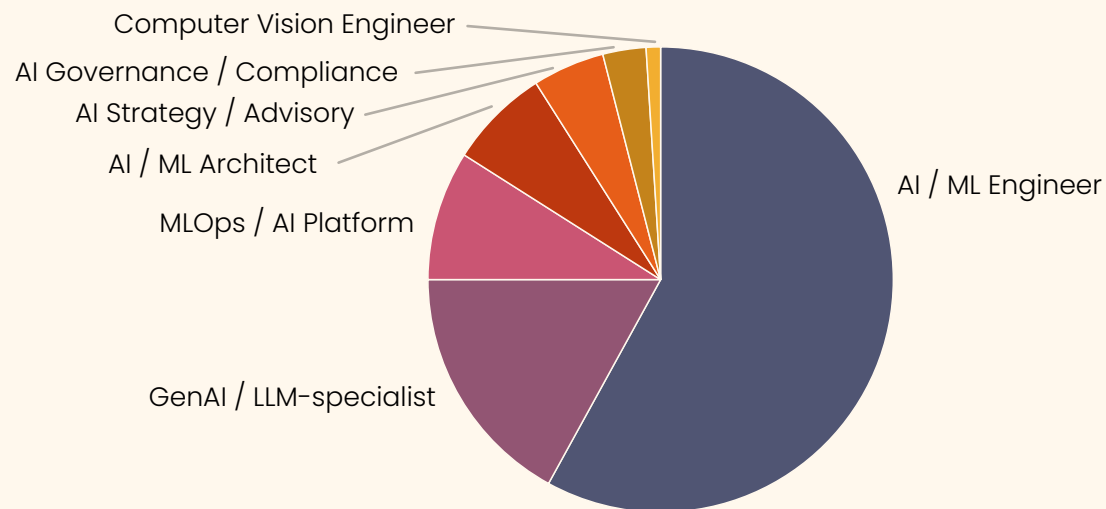
What does it show?

The AI and ML consultant market remains strongly engineering-driven, with AI and ML engineer roles making up the largest share. At the same time, generative AI already represents a significant portion of demand — highlighting how quickly new AI capabilities move from experimentation into production.

In 2025, AI- and ML-classified assignments accounted for about 1.6% of the market, up roughly 0.6 percentage points from 2024.

Strategic roles and assignments related to governance, security, and compliance remain smaller in volume but are clearly visible as distinct segments. All AI sub-areas have grown compared to 2024, though at different speeds. Growth is strongest in generative AI and platform-oriented roles, while traditional ML roles still account for the largest volumes.

Much AI-related work likely takes place under other role titles and is therefore not captured here. The analysis should be read as a picture of how AI demand is articulated, rather than a complete view of all AI-related work.

Pie chart labels: Computer Vision Engineer, AI Governance / Compliance, AI Strategy / Advisory, AI / ML Architect, MLOps / AI Platform, GenAI / LLM-specialist, AI / ML Engineer

brainville 2025

Buzzwords of the year – what they indicate

Each year, we identify the skills that have grown most clearly in demand compared with the previous year. We refer to these as buzzwords – not as a reflection of hype, but as a way to capture shifts in how assignments are formulated and which competencies have become more visible in demand.

Buzzwords should not be interpreted as the most common or dominant skills on the market. Instead, they highlight areas where demand has accelerated, often signalling emerging priorities, new tooling, or changing requirements.

Platforms and infrastructure

A significant share of this year's buzzwords relates to platforms, infrastructure and operations, with examples such as Helm, Linux environments, load balancing and monitoring. This points to a continued emphasis on stable, scalable and standardised delivery, rather than a sole focus on application development.

Buzzwords

This year's buzzwords point to a market where focus is moving toward platforms, governance and robustness. The diversity of the list also shows that demand growth is spread across several distinct competence areas, rather than concentrated within a single technical track.

Helm

Information technology architecture

FastAPI

Security information and event management

Red Hat Enterprise Linux

Anti–money laundering

Google Workspace

Microsoft Fabric

Modbus

IBM BPM

Security and regulation

The list includes both security tools and regulatory frameworks, such as SIEM solutions and DORA. This reflects how cybersecurity and compliance have become more explicit components of assignments, combining technical implementation with organisational and regulatory requirements.

Industry, automation and embedded systems

The presence of industrial protocols and control systems, such as Modbus and other OT-related technologies, shows that demand growth is not limited to traditional IT domains. Instead, similar patterns of change are visible in industrial, automation and embedded environments.

AI – from concept to applied tooling

AI appears both as a general concept and through concrete tools, such as Microsoft Copilot and related platforms. This indicates a shift toward practical application and integration, rather than AI being described primarily at a conceptual or exploratory level.

Data as a platform capability

Buzzwords connected to data largely concern data platforms and governance, with examples such as Microsoft Fabric and Azure Synapse Analytics. This suggests that data is increasingly treated as a long-term capability, where architecture, availability and control are as important as analytical output.

brainville **2025**

How this report is made possible

This report is built on activity from an open market-place.

Brainville can be used free of charge — both by consultants and by buyers of consulting services.

Consulting companies can access and apply for assignments, and buyers can reach a market of more than 30,000 freelancers and consulting firms, without cost or obligation.

Every assignment posted and every application sent contributes to the market activity reflected in this report.

We do not curate, prioritize, or interfere with these interactions. The data is the result of real market activity.

In that sense, this report is not just an analysis of the market — it is shaped by it.

And by you.

Thank you
Manuel, Nils and Magnus
Founders of Brainville

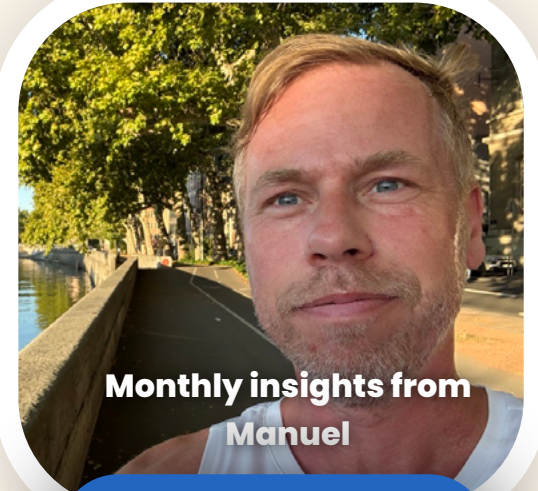## Visit Brainville Statistics for much more stats

Check it out!

🎁

Spread the word

Tag us and get a gift in Brainville

https://brainville.com/goto/BS2025H2

Monthly insights from
Manuel

in Follow

🧠 brainville **2025**