Hopeful Signals, Challenging Times

Insights from Brainville Statistics

First half 2025

Growth meets growing competition

Growing demand was a hopeful sign in the first six months of 2025. But other factors pointed to tougher times, as the number of consultants looking for work reached record-high levels.

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 into the statistics of your choice about the freelance and consulting industry. Brainville Statistics is updated monthly. This is an overview of the market development in the first half of 2025.

The market in numbers

Usually a good indicator of where the market is heading.

H1 2025 vs H1 2024

	H1 2025 vs H2 2024		
Published assignments	**Remote work**	**Buyers' rate**	**Project manager assignments**
−4.3%	**+6.8%**	**+0.5%**	**+4.8%**
Available consultants	**Applications**	**Sellers' rate**	**Registrations**
+20%	**+6%**	**−0.6%**	**+15%**

2025 H1

A stable market – with signs of tough times

The first half of 2025 saw an increase in the number of assignments on offer across the Nordics compared to the previous six months.

On a twelve-month basis, the numbers look less encouraging at first glance. Assignments in Sweden, Brainville's biggest market, were down about ten percent, which strongly affected the overall numbers. But much like in 2024, this was explained by a drop in demand in the Health-care sector while the rest of the market largely remained stable.

However, there were other factors suggesting tougher times for consultants:

- A record number of advertisers without significant market growth. More companies than ever before are using the Brainville platform, but each of them on average has fewer assignments on offer.

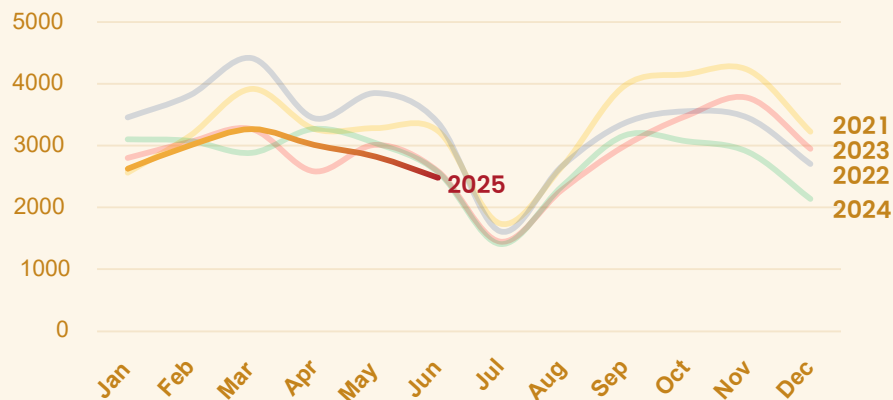- The demand for more experience and skill kept rising. 2024 saw a marked shift in the level of competence requested in the market. This trend continued into 2025, with companies increasingly expecting senior consultants at advanced or expert levels, seemingly more and more confident that they can have their pick among consultants.

- The number of registrations reached a new all-time high. The increase continued the record-breaking trend from the previous two years, with more and more freelancers and consultants seeking assignments.
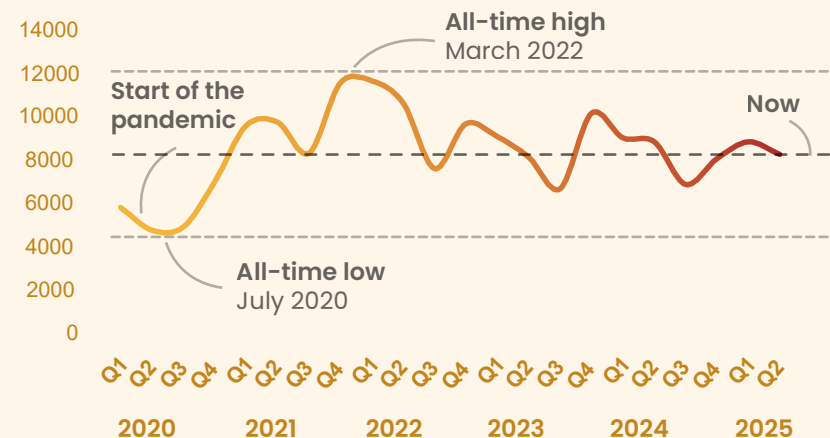
Assignments

What about duplicates?

2.1% of the market's assignments appear to be duplicates.

2021
2023
2022
2024

Growing need for strategy

Management & Strategy stands out with a steady increase in both volume and market share since H1 2023.

All-time high
March 2022

Start of the pandemic

Now

All-time low
July 2020

2020 2021 2022 2023 2024 2025

2025 H1

The share of self-employed professionals and freelancers among them also continued to grow from already record-high levels.

"During the first half of the year, we've seen 10–20 percent more registrations compared to the same period in 2024. In Sweden, growth was record-high almost every month," said Brainville CEO Manuel de Verdier.

Continued trend towards the Nordic capitals

Demand kept growing in the capital regions of the Nordics in the first half of 2025, with Stockholm as the clear winner. Notably, this was not the case in other large metropolitan areas in Sweden, where demand dropped both in relative and absolute terms.

As expected, this was mirrored by the residence patterns of the consultants, with the highest concentration found in the metropolitan regions. Stockholm underlines its position as the region with the highest density of registered consultants on Brainville — one for every 196 residents.

Assignment roles with the highest interest and competition

Most viewed assignments per role

The data shows which roles' assignments have attracted the highest total number of unique visitors. This serves as an indicator of the roles currently generating the most overall interest among users.

1   Project Manager
2   .NET Developer
3   Java Developer
4   Developer
5   Full-stack Developer
6   JavaScript Developer
7   Backend Developer
8   Frontend Developer
9   Data Engineer
10 DevOps

Roles with most unique views per assignment

The data shows which roles attract the largest number of unique visitors per assignment on average. This highlights the areas where competition for assignments appears to be strongest.

1   IT Manager
2   .NET Developer
3   Frontend Developer
4   JavaScript Developer
5   Web Developer
6   Full-stack Developer
7   PHP Developer
8   Product Owner
9   Head of unit
10 Product Manager

2025 H1

New record-high levels of available consultants

The number of available consultants increased month by month during the spring, with levels well above those in 2024, which were already notably higher than the year before. More available consultants is, to some extent, a logical effect of the Brainville platform growing, but could also be viewed as yet another sign pointing to tougher times.
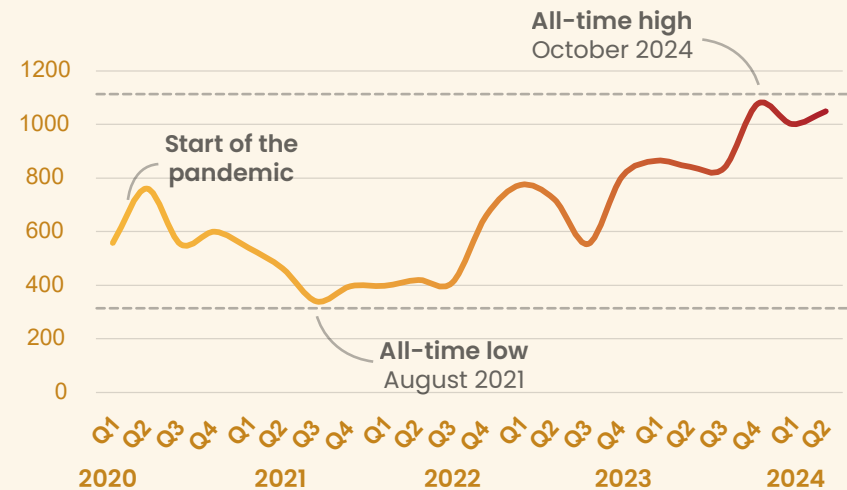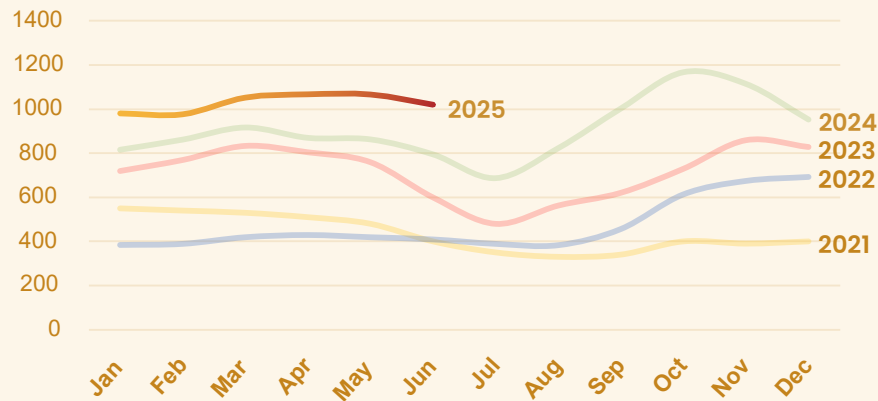
Still, there were hopeful signs. Demand increased in IT & Telecom, Brainville's largest sector by far, during the first half of the year — in absolute numbers as well as relative to other sectors. The number of assignments on offer has not been this high since 2022. This trend was confirmed by the continued growth in opportunities for system developers and for database and BI consultants.

Demand also kept growing in Management & Strategy, reflected in a rise in opportunities for project managers. This can be seen as a positive sign: when an increasing number of projects are launched, the general demand for consultants tends to grow over time.

Available consultants

According to Statistics Sweden (SCB), unemployment in Sweden was 8.7% in June. We have approximated the corresponding figure for the freelance and consulting market. See the last page!

2025 H1

More opportunities for remote work

Remote work gained momentum in the first half of 2025. Around one in four assignments now allowed for remote work to some extent, bringing levels back on par with 2022 and 2023, the years following the pandemic.

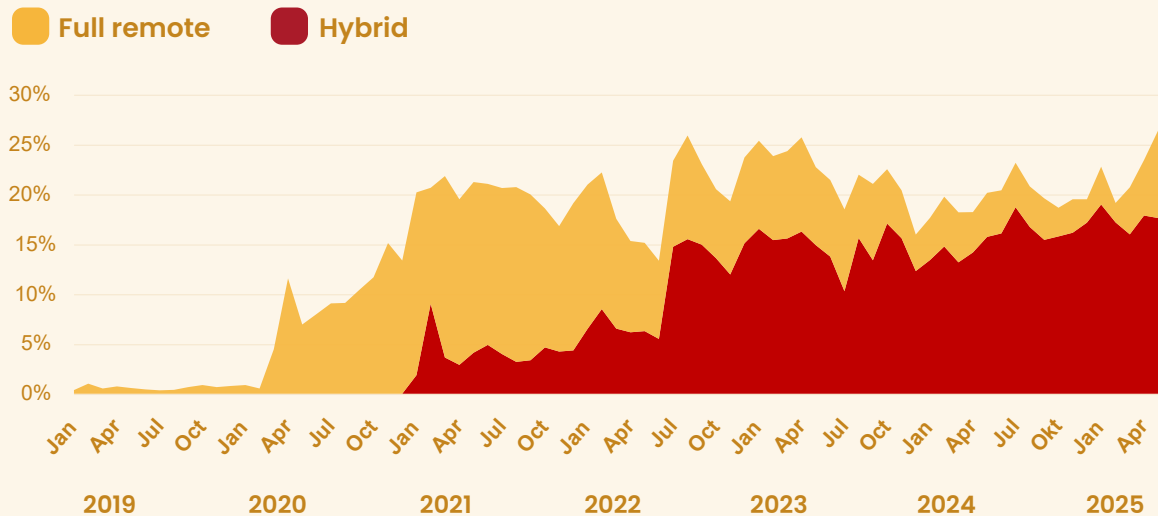The trend towards hybrid assignments — allowing only partial remote work at the expense of fully remote assignments — was also halted. The mix between the two types shifted as the share of fully remote assignments increased rapidly during the spring, while the share of hybrid assignments remained stable.

The share of part-time assignments dropped significantly during the first half of the year — a clear break from the trend seen in previous years. This could be interpreted as being in line with other signs of a tougher market for consultants, in which buyers are able to set stricter requirements regarding availability and capacity. Whether this is a temporary blip or the beginning of a new trend remains to be seen in future reports.

Explore **Brainville Statistics** for current rates and further insights on market trends.

Remote work

🟧 **Full remote**   🟥 **Hybrid**

2019 2020 2021 2022 2023 2024 2025

Buzzwords

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

Helm ⤴

FastAPI ⤴

Information technology architecture ⤴

Anti−money laundering ⤴

Google Workspace ⤴

Red Hat Enterprise Linux ⤴

Security information and event management ⤴

SQL Server Reporting Services ⤴
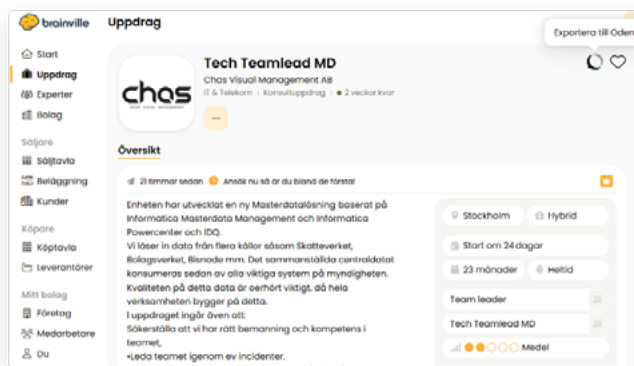
SAP PLM ⤴

Digital Marketing ⤴

2025 H1

Oden + Brainville – komplett affärssystem för konsultbolag

I ett unikt samarbete mellan Brainville, Oden BI och Chas Visual Management har vi haft ambitionen att ta fram det mest kraftfulla och kompletta affärssystemet för konsultbolag.

Här kan du exempelvis exportera Brainvilles uppdrag direkt in i CRM-verktyget tillsammans med dina andra uppdrag genom ett enkelt klick. Samtidigt prenumererar systemet på säljflöden automatiskt. Bland annat Chas Partner Networks över 5000 årliga annonser. Systemet stöttar både konsultchefer, HR och ledning på ett unikt och kraftfullt sätt.

Få full kontroll över resurser, debitering, planering och sälj - allt i ett system. Allt med en kraftfull statistikmotor i grunden med ett kraftfullt API . Allt specialanpassat för konsultbolag eller egenföretagare.

CRM färdigintegrerat mot Brainville

Upplev Divine Power - Nu 30 % rabatt

Just nu kan du som Brainville-användare starta med Oden till 30 % lägre pris. Använd koden **Brainville30** när du kontaktar oss. * Läs mer på oden.se

* Erbjudandet gäller t o m 2025-12-31

KONSULTCHEFENS BÄSTE VÄN

Oden CRM Consulting
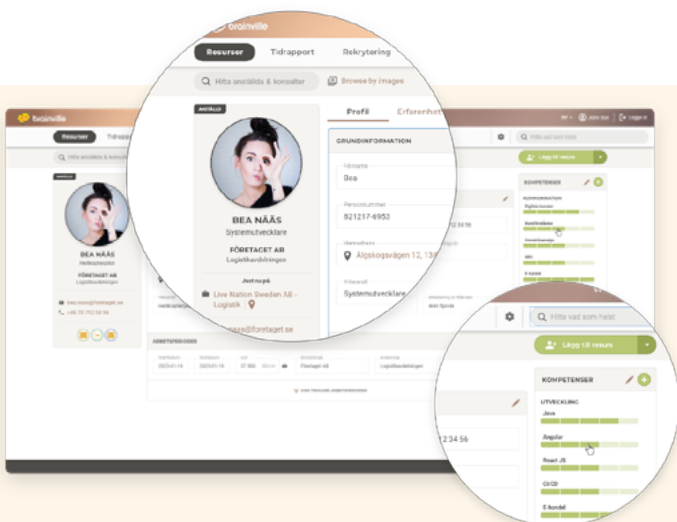Specialanpassat CRM för konsultbolag

- CRM-verktyg
- Brainville-integration
- Många uppdrag inom offentlig sektor – först av alla
- CV-databas
- Beläggningsplanering
- Yrkesrollsinventering
- Personalkort för anställda och underkonsulter
- On- och offboarding
- Kompetensutveckling
- Organisationsvy
- Avtals- och dokumenthantering
- GDPR-efterlevnad

LEDNINGENS BÄSTE VÄN

Oden BI Consulting
Specialanpassat BI-system för konsultbolag

- Inkluderar Oden CRM
- Resultatrapport per dag
- Resultatuppföljning på olika organisatoriska nivåer – koncern, dotterbolag, konsultpool
- Kontroll över debiterings- och beläggningsgrad, med mera
- Över 80 nyckeltal per konsult
- Statistikmotor
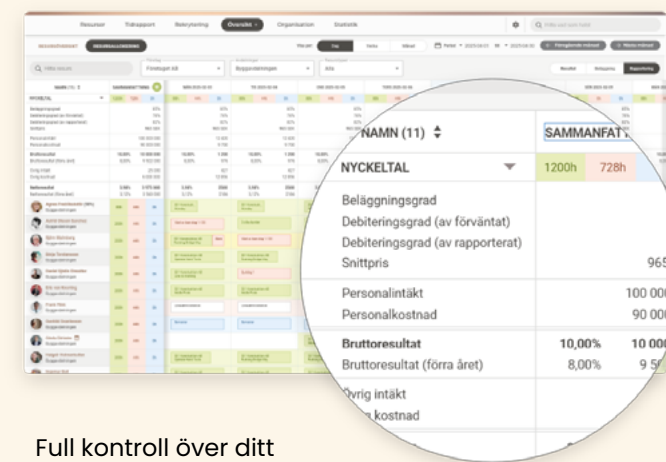- Tidrapportering
- Löne- och fakturaspecifikationer
- API

Läs mer på oden.se

Resurs- och kompetensplanering

Konsultuppdrag och försäljning

Full kontroll över ditt konsultbolag med Oden BI

brainville

7.5%

Work in progress

"Unassignment indicator"

As a counterpart to unemployment figures in the labor market, we have developed an indicator based on the ratio between assignments and active users with the consultant role. The value is approximate and should be seen as a market temperature gauge. It currently stands at 7.5%, down from 8.3% six months ago.

Visit Brainville Statistics for much more stats

Check it out!

🎁

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Monthly Insights from our CEO, Manuel

in Follow

2025 H1