

Malt Tech Trends 2026

How Europe's top
independent talents are
shaping the tech landscape



Executive Summary

The Operationalization Era: Agentic Maturity, n8n explosion and the rise of FinOps

At Malt, we have always been convinced that freelancers are the pioneers of any workforce transformation. By the very nature of their position, operating at the intersection of multiple industries and tech stacks, independent experts are the early warning system of the global tech landscape. They out-train and out-pace traditional structures because they must; to stay competitive, they build the frameworks and test the tools that will become corporate standards tomorrow.

As we approach our first million registered freelancers, our community of +250,000 tech and data experts is signaling that the “AI excitement” of the past two years has matured into deep operationalization. While AI skills were once the exclusive domain of data scientists, they have now penetrated every industry and job category. AI skills are no longer tech-only, appearing as requirements in marketing, graphic design, and management consulting and now cited as a mandatory or power-user skill in 22% of non-tech briefs. The ongoing AI-powered tech revolution is made visible by freelancers, always three steps ahead.

A Fundamental Skill Redistribution

In 2025, we witnessed a tectonic shift in the very structure of our community. The share of profiles highlighting historically dominant skills—JavaScript, Python, and Java—declined by 20% to 30% in a single year.

This isn't a decline in talent, but a clear redistribution of expertise. While 40% of new registrants highlighted JavaScript in 2024, that figure dropped below 20% in 2025, partially replaced by an explosion of expertise in LLM implementation and production-grade automation. The “Builder Mindset” identified last year has evolved into an “Orchestrator Mindset,” where the value lies not just in writing code, but in directing intelligent systems.

From RAG to AI Agents

The most significant signal in our 2026 data is the evolution of “Agentic Maturity.” In 2024, the industry was focused on RAG (Retrieval-Augmented Generation) to feed LLM with corporate knowledge and data and build company-knowledge AI assistants. Today, we are seeing the continuation of a trend, now moving toward AI Agents—autonomous systems capable of reasoning and interoperating with complex toolsets.

While efficiency gains are the biggest driver, the value lies in the capacity to do more and better through deepened customization, without decreasing satisfaction.

The demand is staggering: the number of briefs for AI Agents has exploded by x60, with searches up x26. This represents a fundamental reordering of priorities. AI is no longer a “bolt-on” feature; it is the new engine of architectural change, moving from static information retrieval to active workflow execution.

Executive Summary

The Decoupling of the Tech Stack

What we observe across millions of keyword searches and thousands of project briefs is a clear decoupling between the agile SMBs and the more established Enterprises.

No longer just for “citizen developers,” low-code tools like n8n have seen x14 growth, now leveling in project volume with Java. Interestingly, 71% of these users are senior technical profiles seeking to bypass traditional bottlenecks. They are choosing speed — 80% of projects — and power without the overhead of traditional tech frameworks. Called AI engineers or automation engineers, they combine solid technical expertise either from data science or software engineering with a builder mindset focusing on impact first.

Simultaneously, Enterprises are prioritizing robust, governed infrastructures. Demand for Azure OpenAI has surged by 500%, as companies seek the procurement ease and compliance-ready environments of established providers to manage their most sensitive workloads.

The FinOps Mandate and the Governance Pivot

This “Deep Operationalization” phase brings a new focus on sustainability—both financial and regulatory.

With AI workloads (GPU instances) often costing 10–20x more than standard compute, FinOps projects have surged by 72%. Infrastructure is no longer just about the cloud; it’s about the specialized management of AI-driven costs and technical debt.

Furthermore, as the EU AI Act moves toward enforcement, compliance is no longer a side conversation. Demand for AI-specific regulation expertise has skyrocketed by +380%. Companies are finally cleaning their data foundations—with 48% of projects merging AI governance with traditional data governance—to ensure their ambitions are built on a responsible, legal, and stable base.

Rising Interest for Fractional Tech Leadership

In their AI transformation journey, companies are not only seeking experience to structure their approach with AI consultants but also drive their organization with high-level strategic guidance. This has created a new category of “super-connectors.” Interim and Fractional Tech Leadership (CTOs, CDOs) is now the fastest-growing job category (+23%). Companies are looking for experts who can move fluidly across domains, connecting the dots between AI, security, data, and governance.

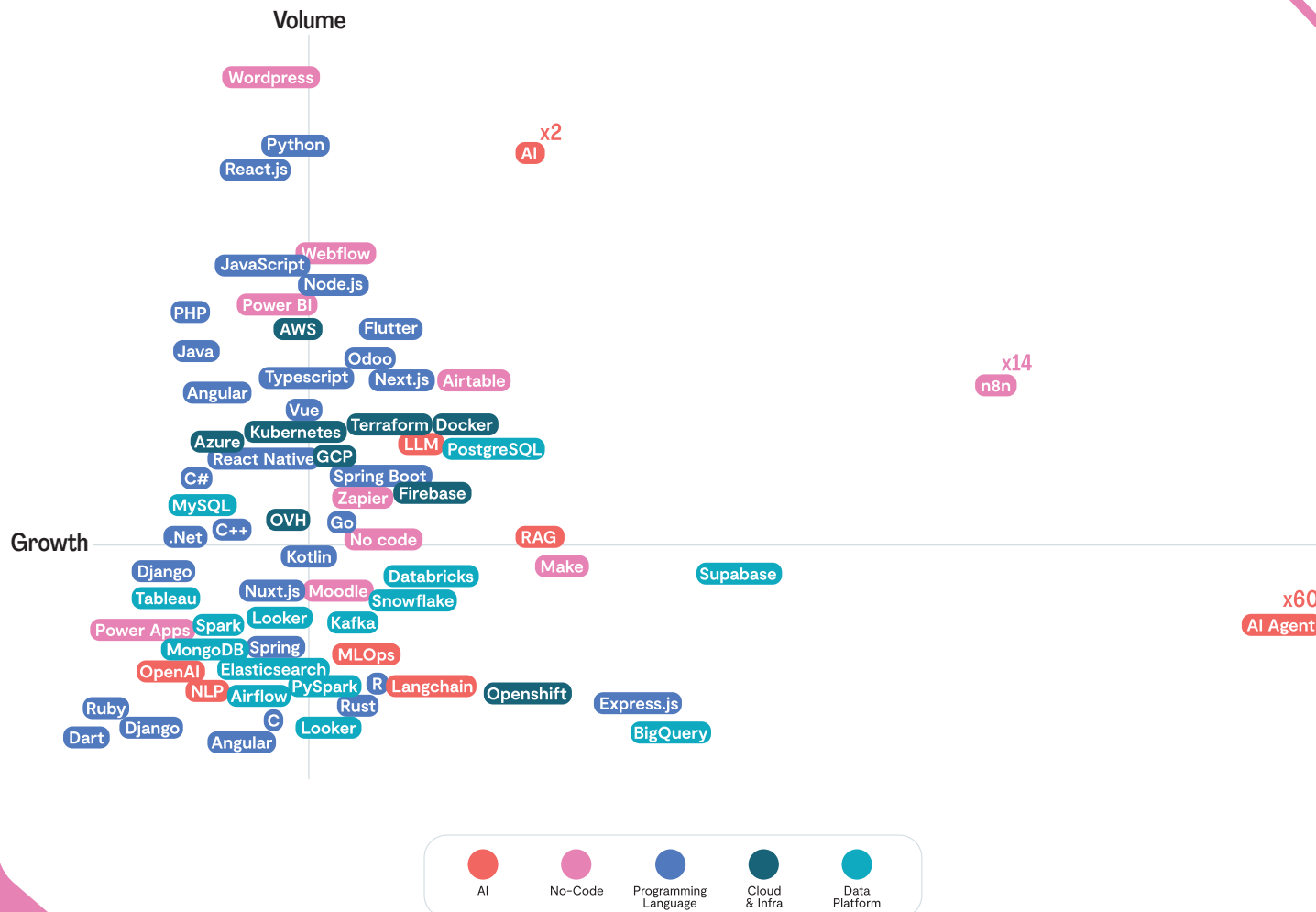
In 2026, the winners won’t be those who adopt the most AI tools, but those who build the most governable, automated, and cost-efficient ecosystems around them.

Benoit Guillon

VP of Engineering,
Malt



The Malt Tech Quadrant



AI & low-code automation skills are the fastest growing skills and their volume increased compared to last year.

- AI Agent demand was multiplied by 60 vs 2024 and replaces RAG in its position on the quadrant.
- RAG demand remains stable in terms of volume and still grows (x3) in the same order of magnitude than more established technologies.
- Demand for low-code workflow automation tools (n8n, Zapier, Make) exploded in 2025. n8n is by far the most popular platform on Malt (with a demand level as high as some already very famous programming languages such as Java).
- Demand on established programming languages and frameworks (Java, PHP, JavaScript, C++, C#...) remain high but tend to stagnate or slowly evolve vs the rest of demand.

Market expert



Florent Edouard

Global Head of the
Digital Accelerator,
Sanofi

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The question is no more what we will do with AI, but what will not be done through AI. The rise of AI agents is undeniable, as shown in the demand uplift, and their orchestration through new frameworks like n8n is a must for companies to fully benefit from this game changer and not drown in agentic chaos.



Malt Tech Skills index

2025 has solidified a fundamental truth with Artificial Intelligence no longer being an optional add-on but the second most demanded skill across the entire Malt platform, irrespective of company size, industry, or project type. This represents a significant acceleration throughout the past year, as the LLM revolution has transformed AI from a specialized domain into a mandatory technical baseline for all job categories.

Top demanded skills by companies

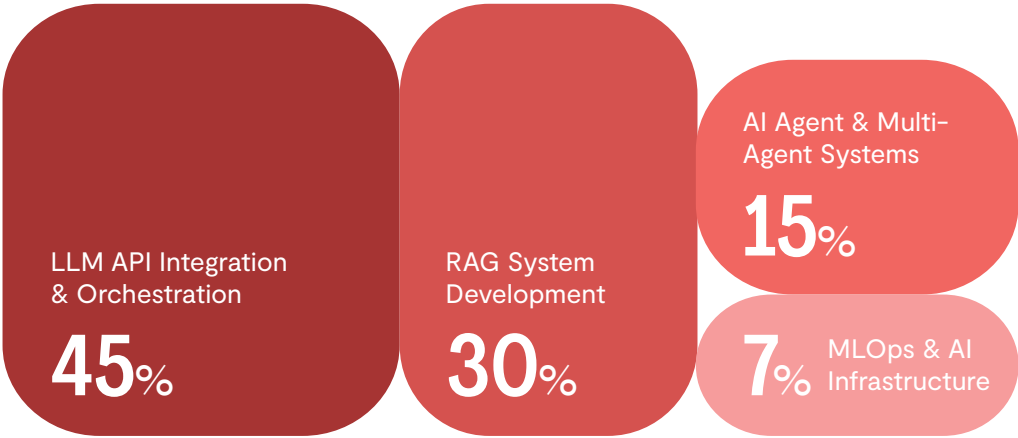
In volume, based on project description

	Skill	Demand Evolution	Supply Evolution
1	Wordpress	-11%	-31%
2	Artificial Intelligence	+125%	+59%
3	Python	-3%	-13%
4	React.js	-16%	-16%
5	Webflow	+4%	-13%
6	JavaScript	-15%	-28%
7	Node.js	+4%	-24%
8	Microsoft Power BI	-1%	-2%
9	PHP	-33%	-33%
10	Flutter	+31%	-13%

In 2023, AI demand was highly siloed, with 70% of projects concentrated within data job categories, primarily for Data Scientists. 2024 saw demand expanding into broader tech roles like Backend and Fullstack Engineers.

Today, we have entered **the era of the AI-integrated Software Engineer**, where 65% of AI skill demand refers to software engineering profiles. While Backend Engineers lead this charge, the requirement has permeated the entire stack, reaching Frontend (6%), Mobile (5%), and even Web Administrators (3%). Adoption speeds vary by organizational scale, but the trajectory is universally upward.

In small and medium companies (SMBs with <1000 employees), the demand for AI-skilled freelancers has more than doubled, whereas larger Enterprises show a steady and robust growth of +25%. This operationalization era relies on four project typologies:



Demand and supply evolution show the actual growth percentage of the market share of the skills amongst the entire marketplace (demand is based on number of project descriptions received by Malt, supply is based on number of freelancers).



Malt Tech Skills index

Top growing skills demanded by companies

Based on project descriptions and corresponding share of supply evolution

	Skill	Demand Evolution	Supply Evolution
1	AI Agent	+5801%	+2420%
2	Zapier	+1545%	+29%
3	n8n	+1191%	+317%
4	Supabase	+352%	+66%
5	BigQuery	+251%	+4%
6	Express.js	+219%	-22%
7	Make.com	+141%	+99%
8	RAG	+129%	+170%
9	OpenShift	+116%	-12%
10	Artificial Intelligence	+115%	+59%

While AI captures attention, the bedrock of the freelance economy remains resilient. **WordPress maintains its position as the most demanded skill** on the overall marketplace, driven by small businesses focusing on site creation or redesign (40%), maintenance (30%), and functional improvements (30%).

Similarly, **Python remains the most demanded programming language** due to its extreme versatility, with its usage distributed across Backend development (48%), Data Science (16%), Data Engineering (14%), Data Analysis (7%), and Cloud (3%). Meanwhile, Node.js continues its year-on-year climb, particularly in Backend and Fullstack contexts (70%), finding its strongest foothold in small and medium tech companies—a direct contrast to the Java and .NET dominance seen in larger corporate environments.

AI & low-code explosion

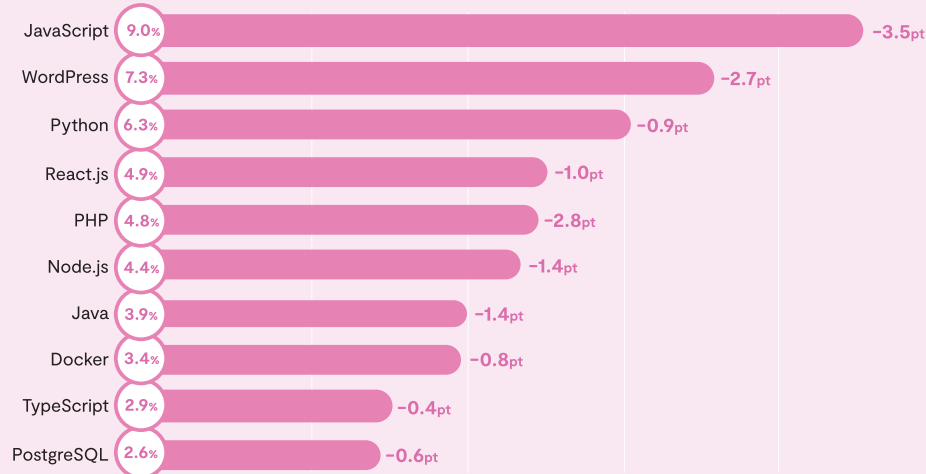
As displayed in the Malt Tech Quadrant, skills related to AI and low-code automations are the ones with the most rapid growth in terms of number of projects. Unsurprisingly, the 3 low-code workflow automation solutions most cited in 2025 are maintaining their position in this top 10.

Due to its growth and its volume of demand and supply, n8n seems to be the category winner. The fact that it is an open-source solution, can be deployed on-premise, and offers simple and powerful integration features with LLMs appears to have won over the small and medium-sized enterprise market.



Malt Tech Skills index

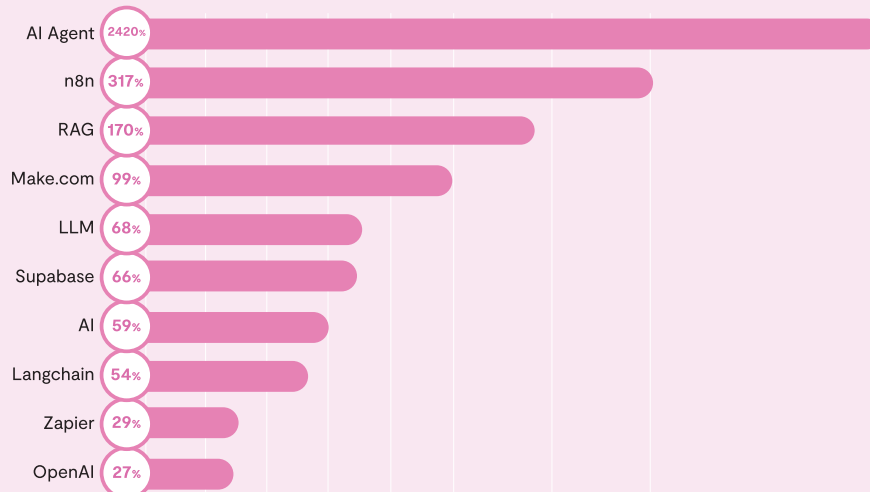
Top skills in volume declared by freelancers



The established and well-known technologies of JavaScript, Wordpress, Python, and React.js maintained their position as the most commonly declared skills among our tech freelancers, showing remarkable stability compared to 2024. Despite this, their overall market share saw a notable decline throughout 2025. This drop is both due to slower growth in the community of freelancers specializing in these areas relative to the overall community, and to freelancers updating their profiles to better align with market trends.

In 2024, about 40% of new tech freelancers highlighted JavaScript when creating their profile. This figure dropped to less than 25% in 2025. In parallel, the share of new freelancers declaring “Artificial Intelligence” in their profile more than tripled between 2024 and 2025.

Top growing skills declared by freelancers



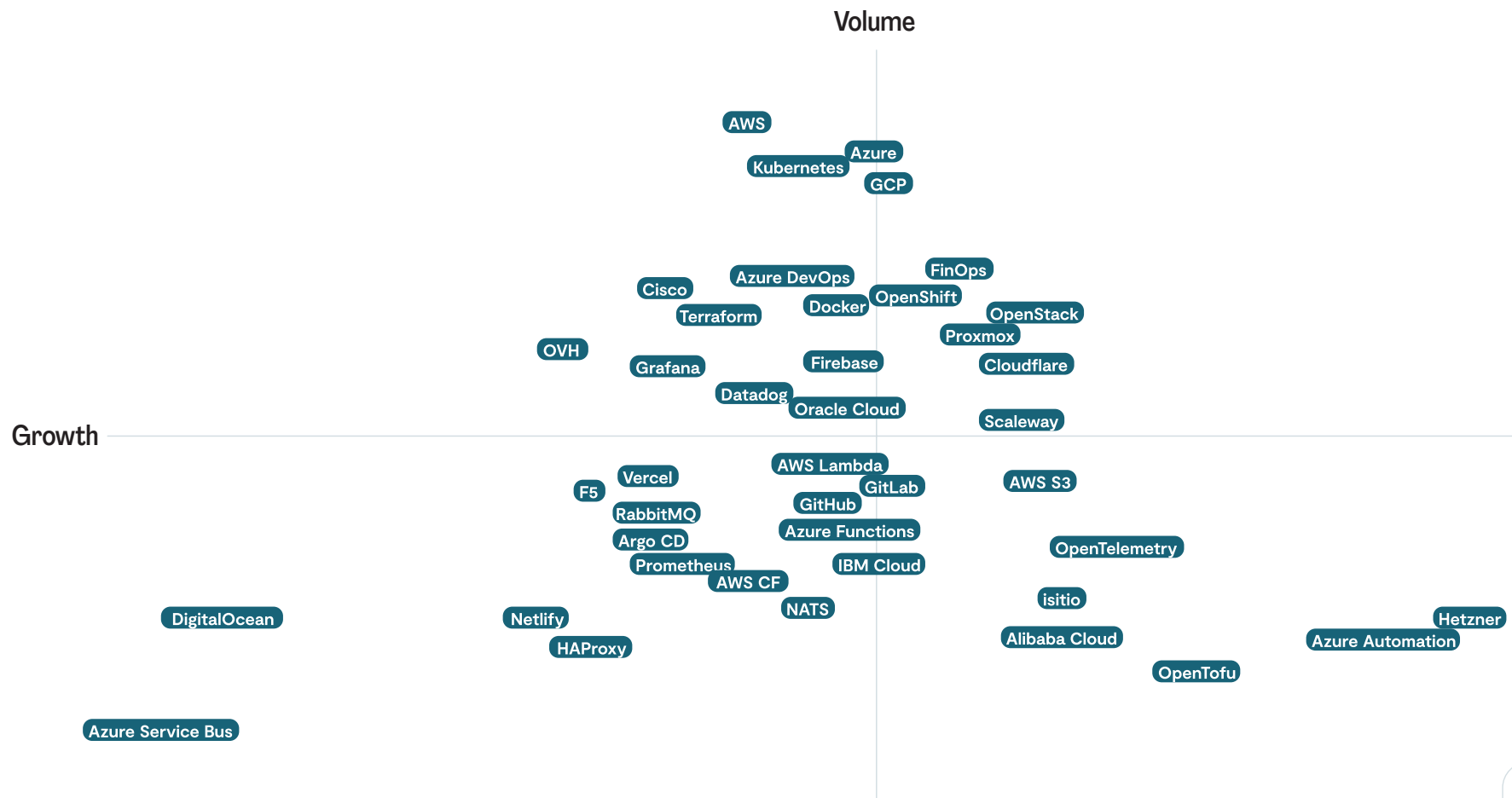
Freelancers now fully focus on AI-related tech skills

The 2025 ranking of the ten fastest-growing technical skills within our community reveals a singular focus: every single entry is dedicated to the implementation of Artificial Intelligence. This shift highlights a pivot by the Malt freelance community, which spent the year upskilling to meet the surging demand for AI and automation engineering.

The readiness of independent experts to spearhead this transition is evidenced by two striking figures: the share of freelancers specializing in AI Agents multiplied by 24x in a single year, while the overall pool of AI-skilled talent on the platform grew by more than 30% YoY. These metrics confirm that freelancers are not just following the market—they are actively building the capacity to fulfill the most complex corporate AI ambitions of 2026.

Cloud & infrastructure deep-dive:

The “Big 3” still dominate the Cloud quadrant





Cloud & infrastructure deep-dive

Top Cloud Providers

Cloud provider	Comparison with AWS	YoY evolution
Amazon Web Services	100%	-7%
Microsoft Azure	71.5%	-1%
Google Cloud Platform	49.5%	+2%

Top alternative cloud providers

OVH	8.7%	-48%
Oracle Cloud	4.4%	-9%
IBM Cloud	0.8%	-2%
Scaleway	0.4%	+35%
Netlify	0.4%	-51%
DigitalOcean	0.4%	-75%
Hetzner	0.4%	+244%
Alibaba Cloud	0.4%	+47%

From migration to AI-driven cost and infrastructure

In the exact same order as past years: Amazon Web Services (AWS), Microsoft Azure and Google Cloud Platform (GCP). But different dynamics are at hand with AWS remaining the most searched Cloud provider but its demand decreased significantly in 2025.

While it remains almost negligible in terms of volume, Hetzner is the most growing technology of our Cloud quadrant.

The VMWare exodus, following its acquisition by Broadcom, clearly materializes in our quadrant with the position of Proxmox and OpenShift.

In an attempt to address vendor-locking concerns, companies increasingly look for open source standards or well established provider-agnostic technologies. Kubernetes remains the second most searched skill in the field of Cloud and infrastructure, along with Terraform or OpenStack (+36%). This trend also applies to observability with the rise of Open Telemetry demand (+64%).

With AI-traction, cloud & infrastructure are now top-of-mind

Cloud and infrastructure have transitioned from a support function to a strategic requirement. As companies move from experimental AI to production scale, infrastructure has become the primary execution bottleneck. This shift is reflected in the data: Cloud Engineer demand grew +29% in 2025, making it one of the fastest-growing categories on the platform.

Cloud & infrastructure deep-dive

1. AI-driven cloud evolution

Organizations are now architecting specifically for AI workloads rather than general-purpose migration. Generative AI on Cloud demand rose +96%, while LLM-specific infrastructure projects increased by +154%. Retrieval-Augmented Generation (RAG) is now a standard architecture (+35%), creating new infrastructure requirements. Vector database demand grew +125%, and MLOps industrialization has moved into the mainstream, with ML Pipeline projects increasing by +85%.

The “Big 3” cloud providers still dominate. Azure OpenAI projects exploded fueled by enterprise trust. Meanwhile, Google Cloud (GCP) utilized Vertex AI (+127%) to achieve a 22% growth in demand, the highest overall growth among major providers. AWS maintains its lead through its massive installed base, through Bedrock (+75%) which acts as the primary entry point for its enterprise clients moving into generative workflows.

	Cloud provider	Share of AI projects	Noticeable skills in projects
1	AWS	44%	AWS Bedrock +75% SageMaker +14%
2	Azure	34%	Azure OpenAI +500% Azure ML +33%
3	GCP	21%	Vertex AI +127%

2. The FinOps mandate: managing the GPU tax

The surge in AI workloads has transformed FinOps from a peripheral exercise into a core engineering mandate. With GPU instances costing 10 to 20 times more than standard compute and LLM API calls scaling exponentially, FinOps projects on Malt have increased by 72%.

This fiscal pressure is driving a 92% rise in budgeting and forecasting requirements and a 58% increase in automated cost monitoring.

The complexity of these environments has catalyzed the emergence of specialized roles, with high demand for dedicated FinOps Architects and Lead FinOps positions to manage overhead that traditional DevOps roles can no longer absorb.

Execution now focuses on granular infrastructure optimization to mitigate cloud sprawl. Storage optimization has grown by 169% as teams implement aggressive S3 lifecycle policies to manage data lakes bloated by training data. This technical tightening extends to database optimization (+52%) and Kubernetes orchestration (+36%) to eliminate over-provisioned instances.

While this drive is visible across all providers, Google Cloud (GCP) environments are seeing the highest friction, with FinOps-related demand surging by 132%.

Consequently, governance and policy enforcement (+64%) – including strict budget limits per project – are becoming standard in the modern cloud operating model.

Market experts



**Alexander
Gottschlich**

Platform and Cloud
Architect, **Elastic2ls**

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AI production scales through architecture, not budget. High AI costs are rarely driven by GPU pricing alone, but by poorly optimized utilization, inefficient inference patterns, and unnecessary data movement. The top priority is therefore platform and workload design: separate training from inference, right-size models, and manage GPU resources efficiently through scheduling and batching.



**Ludovic
Dubois**

Cloud FinOps
Analyst

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For using AI models, the first priority is Intelligent Routing. To avoid the ‘GPU Tax,’ companies must move away from a big model approach and implement a multi system that matches complexity for the most efficient part. Scaling in 2026 means treating AI as a tiered utility, using Small Language Models for the main work and reserving high-cost Models for high-value task.



Alain Duval

Domain Lead &
Cloud Product
Manager, **BPI France**

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By strategically onboarding two FinOps experts, we fundamentally transformed our operational paradigm. We successfully transitioned from a siloed, tool-centric support function to a product-led FinOps strategy centered around our ‘ECO’ platform. This initiative is designed to democratize cloud financial management and empower true ownership by placing the user at the heart of the ecosystem. Today, ECO delivers critical forecasting and consumption intelligence (showback & chargeback); tomorrow, it will drive proactive optimizations through a multi-cloud roadmap perfectly calibrated to our organizational scale.

Cloud & infrastructure deep-dive

3. Sovereignty, the uncomfortable truth

When it comes to cloud and infrastructure, sovereignty crystallizes a growing concern from companies confronted with the reality of an ecosystem dominated by US-based leaders (AWS, Microsoft and Google Cloud). There is a significant tension between corporate rhetoric and technical reality. While the keyword “sovereignty” in project briefs rose +83%, the dominance of US-based hyperscalers remains absolute.

This gap confirms that “sovereign cloud” is often more about marketing than actual infrastructure; currently, only 1.7% of projects are multi-cloud, and a mere 1.2% are cloud-agnostic. In practice, sovereignty for European companies translates to data residency and GDPR compliance within the European regions of US providers rather than an abandonment of their ecosystems.

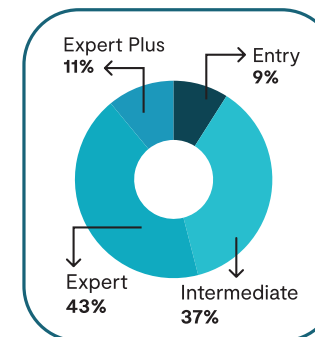
The companies’ quest for sovereignty regarding their technical stack remains a recent concern, clearly amplified by the global context and recent news. Few companies are ready to make a 180-degree technological shift when their investment projects are primarily focused on artificial intelligence. Cloud providers have understood this well and are positioning themselves as accelerators for the deployment and adoption of AI in businesses.

In this context, the best companies can do is adopting abstraction layers as a decoupling strategy. Kubernetes, Terraform, and Docker remain the primary tools for this insurance approach. While still a small portion of the total market, alternatives are seeing niche growth: DigitalOcean demand quadrupled, while Hetzner grew +144% and Scaleway +72%. Simultaneously, the on-premise world is seeing a resurgence of interest; Proxmox demand exploded +500% as SMBs sought virtualization alternatives following major industry pricing shifts.



The Cloud Engineer Expert

Expertise split



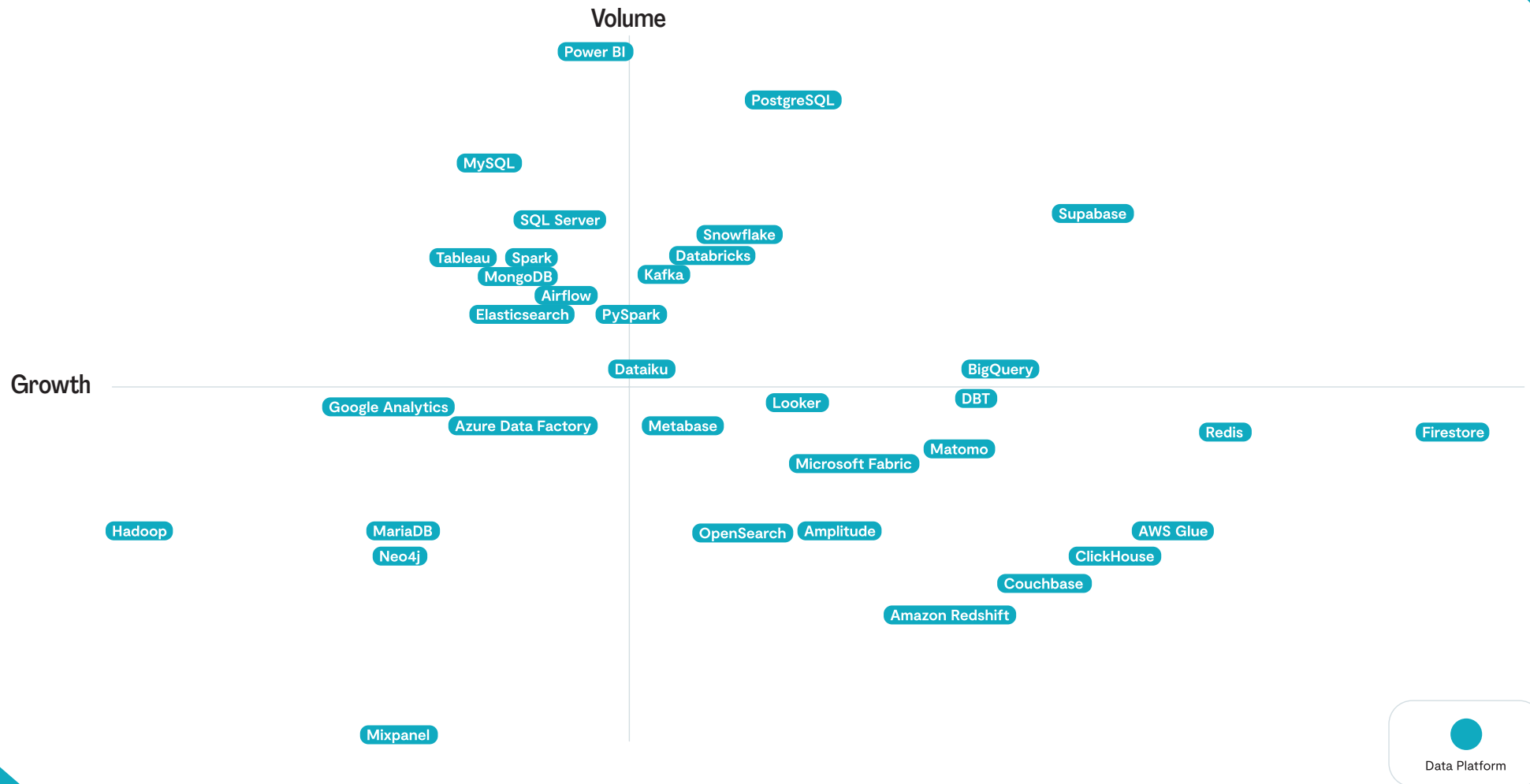
+48%
Supply

€640
Median daily rate

Freelancers top 5 skills

- Docker **+17%**
- Kubernetes **+25%**
- AWS **+21%**
- Terraform **+23%**
- Python **+18%**

Data Platform deep-dive: From BI consolidation to industrialized infrastructure



Data Platform deep-dive

The Convergence and Industrialization of the Modern Data Platform Landscape

The enterprise data platform landscape is consolidating while industrializing at scale. Power BI commands over one-third of BI demand as organizations favor integrated ecosystems over multi-provider strategies.

Data transformation has industrialized around dbt (present in 33% of warehouse projects), creating the Analytics Engineering discipline.

Meanwhile, data platforms are evolving beyond analytics into real-time operational systems (event streaming up 328%) while industrializing operations, with cloud infrastructure demand increasing over 2000%.

1. Power BI dominates BI while Snowflake and Databricks still battle for data warehouse leadership

Power BI has cemented its market dominance at 36.68% share (up from 32.80%), now commanding 3.5x more demand than its nearest competitor. Tableau's 46% decrease signals organizations are consolidating around Microsoft's ecosystem rather than maintaining multi-tool strategies.

In data warehousing, Databricks and Snowflake remain tied at 34.25% market leadership, though Snowflake's growth outpaced Databricks by 13%.

The real shift is cloud-native platforms surging: BigQuery grew 175% to 15.28% share, and Microsoft Fabric grew 75% to 9.72% share.

This dual strategy is emerging in the market, with some organizations favoring ecosystem integration while others continue with best-of-breed approaches, indicating increasing competition and potential market fragmentation.

Meanwhile, open-source ClickHouse grew 200% (3.95% share), with freelancer adoption (62% growth) outpacing demand, suggesting the community anticipates future sovereignty requirements for organizations concerned about vendor lock-in.

2. dbt is moving from niche tool to industry standard, with Analytics Engineering rising

dbt demand surged 42% year-over-year and is now required in 33% of all data warehouse projects, reflecting a fundamental architectural shift: transformation logic has moved from external ETL tools into the warehouse layer itself, where it's treated as version-controlled, tested code.

The freelancer community confirms this transition. dbt expertise among data engineers grew 70% year-over-year, and among data freelancers with cloud warehouse skills, one in four now masters dbt.

Meanwhile, Analytics Engineer roles (a position that barely existed a few years ago) exploded 103%, validating the emergence of a new discipline, and role. dbt has become the expected approach to data transformation, and Analytics Engineering is now a distinct discipline that applies software engineering practices to data.

Data Platform deep-dive

Note: Operations skills are not included in the data platform quadrant because they are classified under the operations category. This analysis specifically examines operations skills within the context of data projects.

3. Data Platforms industrialized at enterprise scale

Data platforms are industrializing at unprecedented scale: cloud infrastructure demand surged 2,196% (Docker up 2,455%, Kubernetes up 2,400%, Terraform up 1,966%), reflecting their evolution into enterprise-critical platform organizations with production-grade requirements.

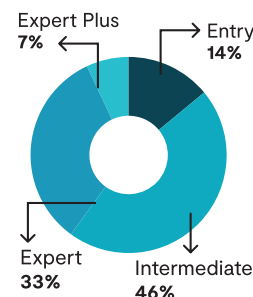
This industrialization accompanies a shift from analytics to operational systems. Kafka demand exploded 328%, driven by requirements for real-time event processing, production ML pipelines, and operational workloads where systems must react to events as they occur.

However, severe talent gaps threaten execution speed: while Kafka demand surged 328%, Kafka skill among data freelancers grew only 15%, creating a 21x supply-demand mismatch. As data teams transition from analytics support to core platform engineering, these skills shortages will drive competitive hiring markets and potential project delays through 2026, particularly as organizations race to scale their data platforms for AI workloads.



The Data Engineer Expert

Experience



Demand for ops skills in data projects increase by

2196%

+48%
Supply

€560
Median daily rate

Freelancers top 5 skills

Python **+28%**

SQL **+24%**

Spark **+20%**

Git **+12%**

Docker **+12%**

Market experts



**Anaïs
Ghelfi**

VP Platform &
Agentic systems, **Malt**



Data platforms are entering a new dimension, and honestly, it's an exciting time. dbt industrialized transformation, Analytics Engineering became a real discipline, and now we're seeing the industrialization of data platforms. A strong signal that data platforms have become critical infrastructure, not just for analytics, but for operational use-cases and AI at scale.



**Christophe
Blefari**

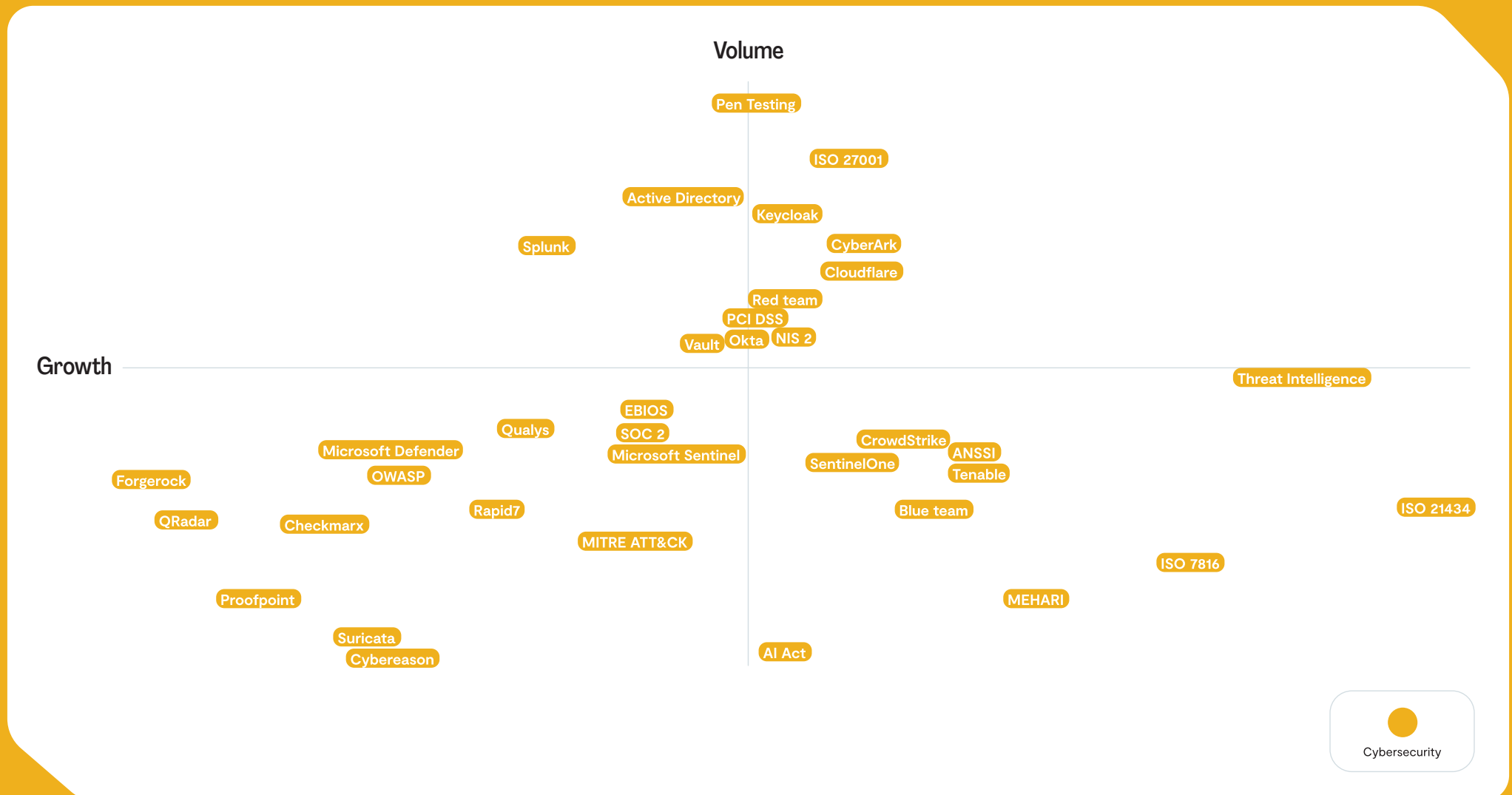
Staff Data Engineer
& Founder, **Nao Labs**



While AI captures all the attention, dbt has silently become the industry standard for data transformation, no credible alternatives exist. Meanwhile, the market is consolidating: the dbt Labs-Fivetran merger bridges ingestion and transformation into a unified platform, challenging legacy ETL tools like Alteryx and Talend.

Cybersecurity deep-dive: Regulatory compliance and technical security are driving demand

Over the past year, cybersecurity solidified its position as one of the most dynamic and critical tech markets, undergoing a deep transformation where regulatory compliance drives as much demand as technical security.



Cybersecurity deep-dive

Top GRC skills searches on Malt

% freelancers evolution

ISO-27001 (+31%)

-7%

GDPR (+19%)

-8%

PCI DSS (+3%)

-10%

NIS 2 (+12%)

+67%

EBIOS (-24%)

-24%

SOC 2 (-20%)

+29%

ISO 21434 (+558%)

+8%

ISO 7816 (+229%)

-37%

MEHARI (+119%)

-23%

The GRC convergence crisis

Today, over half of cybersecurity projects concern Governance, Regulation and Compliance (GRC), showing organizations are investing heavily in cybersecurity governance frameworks and risk assessment programs. The latter represent 20% of overall cybersecurity projects, usually triggered by regulations, certification projects or previous security incidents and require specific methodological expertises (EBIOS, MEHARI, ISO 27005, OCTAVE).

While ISO 27001 remains the most demanded GRC project type for maturity assessments and roadmap orchestration, the enforcement of NIS 2 since October 2024 has become a permanent fixture of the European regulatory landscape.

Other GDPR compliance projects range from Data Protection Impact Assessments (DPIA) projects to interim DPO positions for small businesses lacking internal resources or DPO additional support for larger organizations. The characteristics of GRC projects highly depend on the nature of the client companies.

- Large enterprises run complex, multi-faceted GRC programs, often in regulated industries, requiring expert freelancers for 6 months and more.
- Mid-market companies are typically seeking to enhance their existing security programs (ISO certification projects, GDPR gap analysis...)
- Smaller companies increasingly seek fractional CISO roles to use pragmatic compliance as a decision-making tool to better structure their cybersecurity strategy, but also as a sales enabler, facing pressure to comply from their clients.

GRC is moving downstream, from the exclusive domain of large enterprises to a requirement for companies of all sizes, with expert freelancers serving as the flexible talent for this democratization. This significant growth in demand, coupled with slower growth in the number of freelancers, leads to strong market tightness and a scarcity of talent in the cybersecurity domain, and more specifically in GRC.

Cybersecurity deep-dive



Jehanne
Dussert

Tech Lead GenAI,
AI Governance Lead

“ AI governance is still stuck in the declaratory phase: frameworks, policies, checklists. The next frontier is operationalization: continuous monitoring, real-time observability, measurable compliance in production. Until organizations bridge that gap, governance remains a promise, not a practice.

The rise of AI is fundamentally reshaping the GRC landscape in three concurrent ways, forcing a rapid evolution of both the discipline and the required profiles.

1. **AI introduces entirely new compliance obligations:** the EU AI Act creates a new compliance system alongside traditional frameworks, requiring GRC professionals to master AI-specific concepts like high-risk system classification, algorithmic transparency, fundamental rights impact assessments, and model governance that didn't exist in their traditional ISO 27001 or GDPR toolkit.
2. **AI is being leveraged as a tool** with LLM helping increase the velocity of projects where content authoring skills are key. AI is now also used to automate GRC workflows, evidenced by the emergence of a new type of GRC projects mentioning AI-powered tools for compliance monitoring, risk assessment and audit automation.
3. Most critically, **AI is creating a convergence crisis** with a blurring of traditional GRC boundaries. The typical GRC project now demands simultaneous expertise in GDPR (data used to train AI models), NIS 2 (AI systems in critical infrastructure), ISO 27001 (information security management), cybersecurity (AI security guardrails against prompt injection and jailbreaks), and AI Act compliance.

Cybersecurity deep-dive

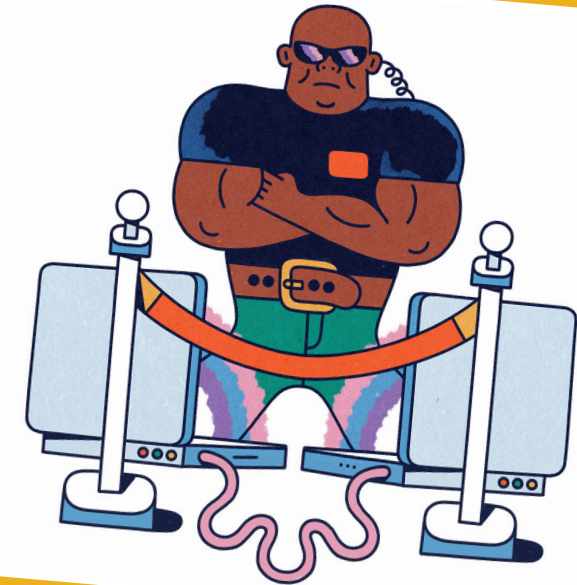
Proactive Defense and Web Security

Penetration testing and security audits stand as the second most frequent project category, with a sharp focus on web applications and APIs (45% of projects). A notable shift in the data shows that while OWASP remains part of the top 10 cybersecurity skills for new freelancers, it is decreasing in search frequency—suggesting it has become a “mandatory baseline” rather than a competitive differentiator. Infrastructure and network penetration testing (25% of projects) has pivoted toward critical internal bottlenecks, particularly Active Directory and VPN configurations, as companies harden their internal perimeters.

Industrialization of Security Operations (SOC/SIEM)

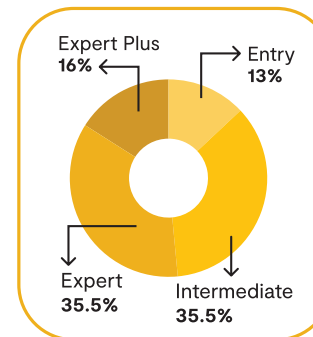
Microsoft Sentinel has emerged as the dominant platform, capturing 49% of projects and seeing a +34% growth in freelancer adoption. These projects span from SOC analyst (level 1 to level 3) and interim SOC team management to SIEM implementation and migration to Cloud SIEM (from on-premise to Sentinel). We see a surge in projects referencing SOAR (Security Orchestration, Automation, and Response) and AI-powered anomaly detection. By leveraging LLMs to increase project velocity and automate risk assessments, organizations are finally moving toward real-time, actionable threat intelligence that can scale alongside their AI ambitions. Most common use cases are automated anomaly detection, threat intelligence enrichment, alert correlation and automated response.

SIEM platform	% of SIEM projects	% freelancers evolution
Microsoft Sentinel	49%	+34%
Splunk Enterprise Security	36%	-2%
Elastic SIEM	11%	=
IBM QRadar	5%	-10%



The Cybersecurity Expert

Experience



+65%
Supply

€675
Median daily rate

Freelancers top 5 skills

- ISO-27001 **+32%**
- Risk analysis **+26%**
- Penetration testing **+21%**
- Python **+22%**
- active directory **+26%**

Software development deep-dive: balancing the pendulum between low-code and as-code solutions

	Programming Language	Demand Market Share evolution
1	Python	-3%
2	JavaScript	-15%
3	PHP	-33%
4	Java	-32%
5	TypeScript	-1%
6	C#	-30%
7	Golang	+17%
8	C++	-25%
9	Kotlin	-7%
10	R	+29%

Introduction

Why decide to group together the analysis of programming languages and no-code / low-code frameworks into one single ‘software development’ section?

A clear pendulum mechanism is gradually being established between no-code / low-code solutions and as-code solutions. Rather than opposing them, these solutions must now interoperate and integrate so that we benefit from the best of both worlds.

This pendulum mechanism is directly tied to the maturity of the desired solutions. To reduce risks, squeeze time to market, and test more. That is the promise of low-code / no-code tools.

With the evolution of no-code and vite-coding tools, we will probably see more and more strategies with solid “as-code” foundations complemented with fast-pace no-code / low-code and experimental satellites. Creating an unified tech approach covering cybersecurity, compliance and governance is clearly the next frontier.

This section is undeniably the section deserving of the most careful and precise reading given how this area of the market evolved over the past year.

Companies changed priorities...

With the number of projects and searches performed on Malt having all increased between 2024 and 2025, seeing such negative market share shifts for established technologies like Java (-32%) or PHP (-33%) shows how much companies changed their tech strategies over 2025.

Software development deep-dive

	Programming Language	Absolute number of freelancers evolution
1	Python	+19%
2	JavaScript	=
3	PHP	-7%
4	Java	+1%
5	TypeScript	+20%
6	C#	=
7	Golang	=
8	C++	=
9	Kotlin	+11%
10	R	=

... and freelancers adapted to these changes

We observe exactly the same trend on the supply side with the evolution of tech & data freelancers. While the absolute number of these freelancers grew by 39% in 2025, the proportion declaring most established programming languages in their profile got totally diluted by this growth ending up with negative share evolutions for most languages. It is necessary to move to absolute numbers evolution to capture that TypeScript (+20%), Python (+19%) and Kotlin (+11%) are the languages with the most rapid growth in 2025. This confirms also the associated technical evolutions:

- JavaScript developers tend to learn and adopt TypeScript
- Java developers tend to learn and adopt Kotlin
- Python is the most attractive language for freelancers given its versatility and how it fits with AI projects

PHP developers

The absolute number of freelancers who declare PHP as one of their expertise significantly decreased in 2025 (-7%). These freelancers did not particularly leave the platform but adapted their profile and positioning to better fit the evolution of demand and a very crowded market on PHP. We observed that the majority of freelancers who removed PHP from their profile in 2025 declared React.js and TypeScript instead, moving to a more modern and more valuable segment of the market.

Software development deep-dive

Companies invest in their mobile applications

Demand for mobile developers significantly grew in 2025 (+20% all technology combined) and this trend just confirms that companies do not just wonder “Should we have an app?” but “How do we make our app the center of our ecosystem?”.

Despite a higher development cost, companies keep investing in their applications as their ROI is proven to be higher as well with superior engagement and conversion rates than web applications.

From a technology perspective, the native vs cross-platform battle is still on-going but the mix tends to evolve towards newer cross-platform projects as technology matures and associated development and maintenance costs are slightly lower.

In 2025, approximately 45% of projects on Malt were cross-platform up from 36% in 2024.

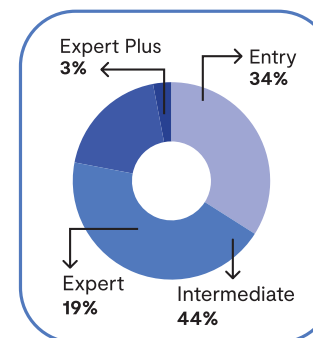
When a native mobile development strategy is executed, the iOS and Android platforms are equally represented with Swift for iOS and Kotlin for Android.

Flutter is becoming the dominant cross-platform framework. The combination of Google backing, excellent performance, single codebase, and strong UI capabilities is driving massive adoption.

Flutter is now approaching 40% of all mobile projects. React Native represents less than half of Flutter but continues growing.



Experience



+31%
Supply

€400
Median
daily rate

Freelancers top 5 skills

Android **+3.6%**

iOS **+2.4%**

Java **>=**

Swift **>=**

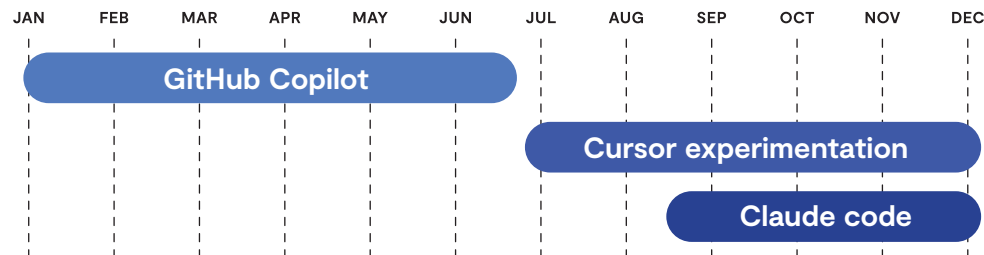
Firebase **+14.6%**

Software development deep-dive

About coding assistants

The world of AI coding assistants having quickly evolved throughout 2025, we have tried to measure how this evolution has translated into implementation projects, and whether these assistants started being mentioned in company ecosystem descriptions.

We observed a clear upward trend in the number of projects focused on integrating AI coding assistant tools into development teams over the year. The adoption trajectory showed a progression:



1 January to June

The focus was primarily on projects involving GitHub Copilot.

2 Starting July

We noted a rise in experimentation projects utilizing Cursor, which matured significantly throughout the latter half of the year.

3 End of the Year

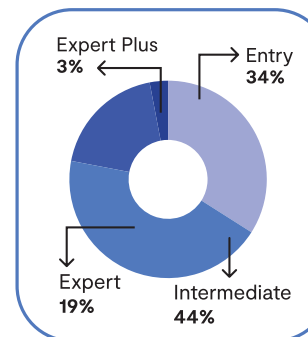
Claude Code began appearing in some project descriptions.

We also start seeing some companies mentioning coding assistants as part of their technical stack description or projects required skills.



The React.js Expert

Experience



+17%
Supply

€560
Median daily rate

Freelancers top 5 skills

JavaScript **+15%**

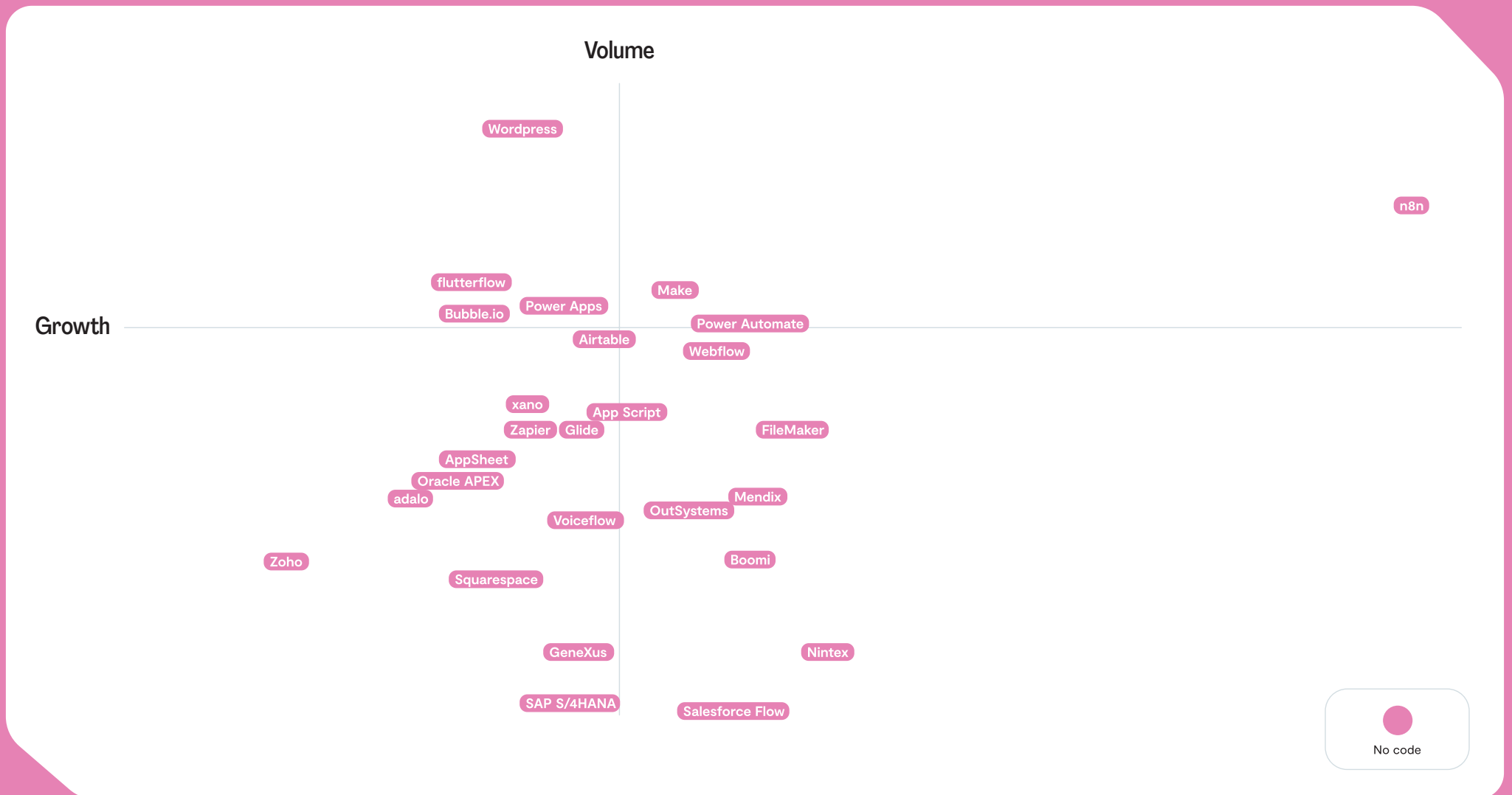
node.js **+19%**

TypeScript **+38%**

CSS3 **+12%**

next.js **+52%**

Low-code and no-code focus: from revival to standardization and usage by senior tech profiles



Low-code and no-code focus

Website creation and CMS market now challenged by AI-powered creation tools

Website creation and Content Management System (CMS) tools represent the category with the highest demand volume on Malt; it appears as a mature market with a slow evolution within this category.

WordPress remains the most popular tool but its demand has significantly declined (-11%), and its market share among our freelancer community is also shrinking by over 30%, while Webflow usage is growing rapidly (+39%).

However, despite this growth, the volume of WordPress projects still vastly outweighs Webflow projects, with 16 times more being posted on Malt.

With the rise of vibe-coding and AI-powered creation tools, this market is challenged. While not formally identified as a required skill in project briefs or searches, mentions of Framer AI to generate simple websites are visible in descriptions.

Flutterflow leadership continues over mobile applications

Applications creation ecosystems aim at building complete applications (mobile or web) without traditional coding.

For mobile applications, Flutterflow —mainly involved in building MVPs— is now a solid leader on Malt and continues growing significantly, followed by Glide used to build simple data apps.

The explosion of workflow automations tools with n8n leading the charge

The low-code & no-code market growth is now driven by the rapid adoption of workflow automation tools, the most famous examples being n8n, Make (ex Integromat) and Zapier.

In 2024, AI gave these tools their second act as they democratized LLM usage to non-experts. The past year has confirmed this trend with a +1390% in n8n projects on the platform.

This explosive growth shows how much n8n has gone from a niche tool to a mainstream automation and integration platform in just one year, making it one of the fastest-growing technology categories on Malt and genAI integration remaining its main driver.

Because of its open-source foundations with self-hosted options, flexibility and agility, n8n has become an SMB and startup favorite with 82% of demand driven by business under 50 employees.

The low-code/no-code naming remains misleading regarding tools like n8n as they do require a certain level of technical thinking. Being faster than coding and more powerful than Zapier, n8n has become the best fit for developers wanting to accelerate.

n8n projects analysis over the past year reveals a wide variety of use cases, including CRM/Marketing automation (35%), AI agent integration (25%), API connectors (15%) and data pipelines (15%).

Expected benefits range from time savings (80% mention) to cost reduction (60%), scalability (50%) and data consistency (40%).

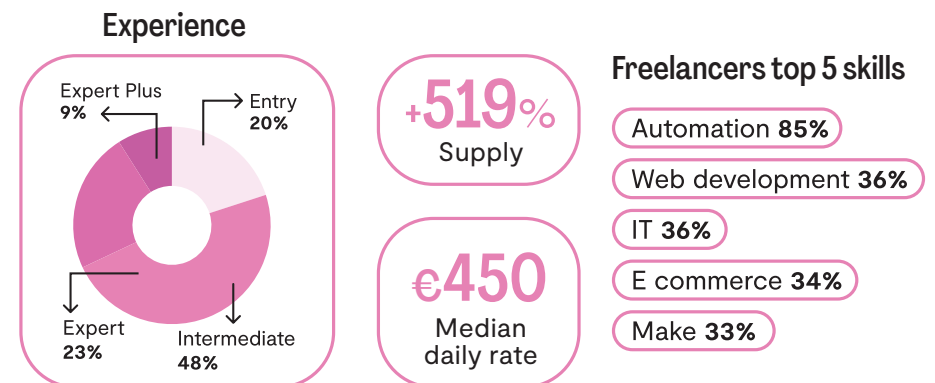
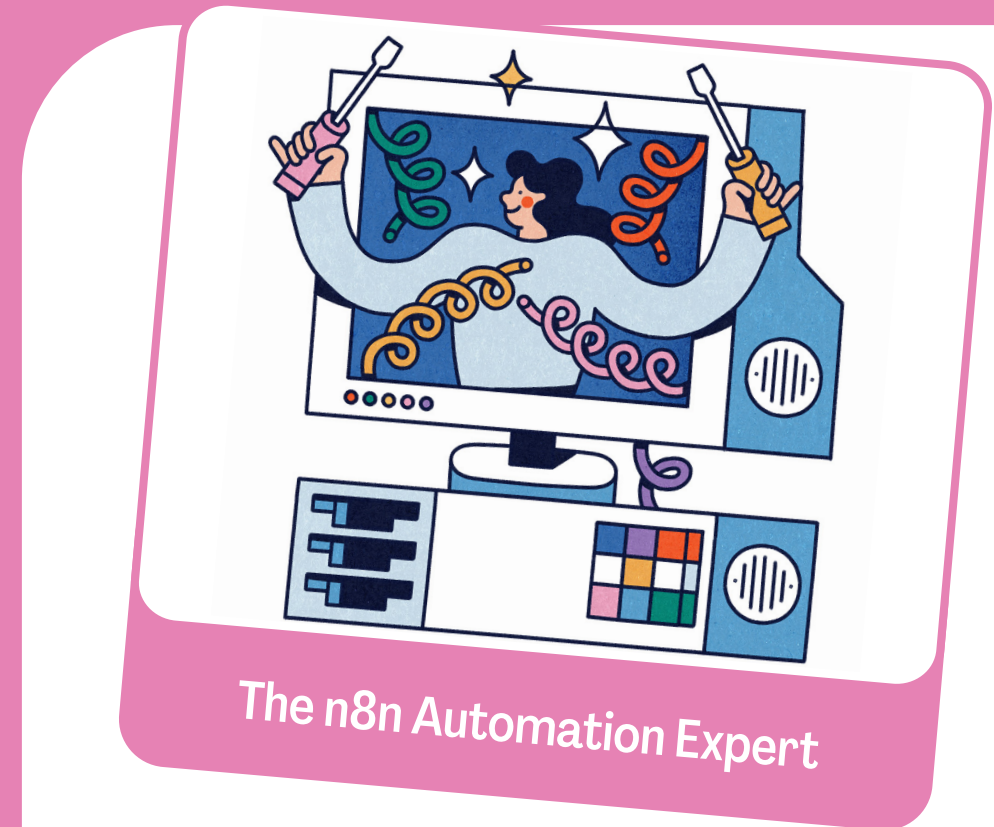
Low-code and no-code focus



**Jordi Bufí
Caballero**

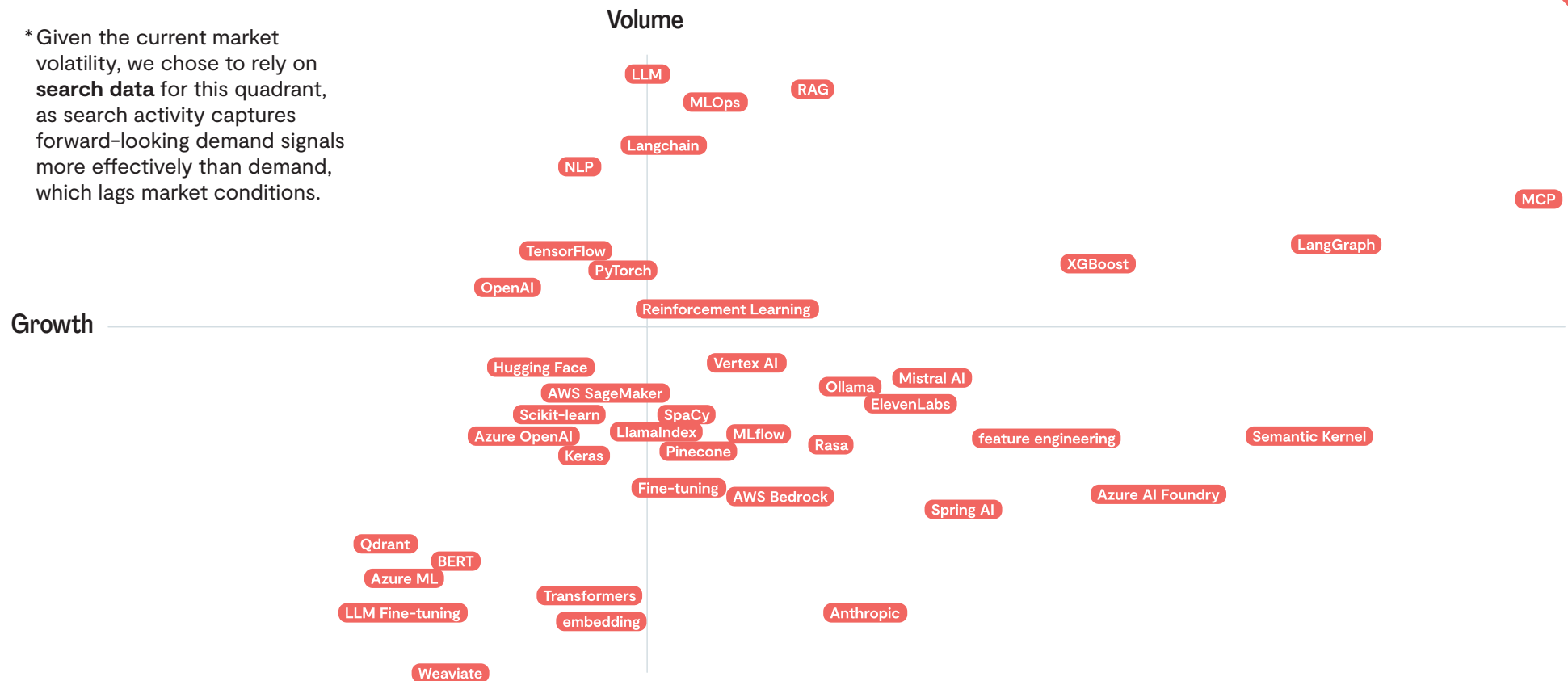
Agile Coach & Scrum Master,
Transformación Digital

“ The real cost of custom middleware isn't the code. It's the cognitive load it creates for every engineer who inherits it. n8n externalizes that complexity, which means your senior engineers spend less time deciphering past decisions and more time making better ones. For a CTO, that's not a tooling choice. It's a team health decision.



Artificial intelligence deep-dive: The rise of agentic system & two-speed market evolution

* Given the current market volatility, we chose to rely on **search data** for this quadrant, as search activity captures forward-looking demand signals more effectively than demand, which lags market conditions.



Artificial intelligence deep-dive

Embracing the AI two-speed and the Python consensus

This past year has revealed AI's fundamental two-speed evolution: enterprises are industrializing their first agentic systems while freelancers bet on their successors.

AI agent demand multiplied 60x year-over-year as organizations transition from RAG architectures to autonomous systems that complete tasks, not just answer questions.

Meanwhile, the freelancer community is adopting emerging tools at explosive rates (LangGraph +1,007%, MCP +2,788%) while client demand for these same tools remains negligible, positioning for future architectures while enterprises stabilize 2025 stacks.

The only consensus? Python as GenAI's undisputed language. However, the GenAI tooling ecosystem remains fragmented across competing solutions with no clear winners emerging. The market is moving too fast for standards to form, making freelancer adoption patterns the clearest signal for what's next.

1. The agentic stack takes shape as enterprises move to production

AI agent demand exploded 60x year-over-year, marking the shift from "AI that answers questions" to "AI that completes tasks." Autonomous systems now reason through workflows, use tools, and execute actions independently across multiple steps.

The AI Engineer freelancer community grew 229% to meet this demand, emerging as a hybrid role combining AI expertise, capable of deploying production-ready AI products.

The fragmentation persists

Agentic framework demand surged 62%, but the ecosystem is splintering rather than consolidating. LangChain maintains 75% market share but lost 16 percentage points in a year (down from 91% in 2024).

On the supply side, the overall growth is +182%, and we observe freelancers hedging across specialized frameworks even faster:

- LangChain: 64% share (down from 71%)
- LangGraph: 15% share (up from 3.3%)
- LlamaIndex: 6% share (down from 8.5%)
- CrewAI: 3% share (up from 1.4%)

Fragmentation reveals the market is still in discovery mode. Each framework pursues distinct architectural strategies: LangGraph for stateful workflows, CrewAI for agent collaboration, LlamaIndex for retrieval-heavy systems because consensus on agentic design patterns doesn't exist yet.

The foundation layer: RAG + Vector databases mature

RAG demand grew 129%, becoming a commodity in agentic architecture design. Vector databases emerges as essential infrastructure (+66% demand), but show even sharper fragmentation than agentic framework: the largest player (Pinecone) holds only 26% freelancer share, with Qdrant (+300%), ChromaDB (+429%) growing explosively from small bases.

Artificial intelligence deep-dive

2. The LLM battles intensify as multi-model strategies emerge

LLM demand grew 35% overall, but market share dynamics reveals a competitive landscape. OpenAI remains dominant with 57% market share but is losing ground rapidly, down 18 percentage points in a year. The challengers are:

- Gemini (Google): +39%, 19% share
- Claude (Anthropic): +89%, 11% share
- Llama (Meta): +21%, 6% share
- Mistral (Mistral AI): +8%, 4% share

Multi-model strategies emerge as organizations prioritize different factors: some optimize performance for specific workloads, others ensure resilience through vendor diversification, maintain control via customization and sovereignty, or focus on cost efficiency.

3. Production maturity arrives: MLOps industrializes GenAI

MLOps becomes non-negotiable

MLOps being mentioned in project briefs exploded 178% year-over-year, reflecting the shift from experimental GenAI projects to production deployments. A severe talent shortage is emerging with MLOps supply growing only 63%, creating a 1.7x demand-supply differential. MLOps freelancers leverage years of traditional ML deployment experience (GPU infrastructure management, model evaluation methodologies, production observability) to address the challenges GenAI projects now face in production.

Demand-side data reveals no clear tooling preferences emerging alongside MLOps mentions. However, the supply side tells a different story: GenAI-specific monitoring tools are gaining traction, though no dominant player has yet emerged. While traditional ML platforms show steady growth (MLFlow +39%, Kubeflow +14%), GenAI-specific monitoring tools are experiencing explosive freelancer adoption; Langfuse (+1,900%) and Langsmith (+533%) are signaling that existing ML tooling doesn't fully address GenAI operational requirements.

4. Diverging paths: MCP's speculation vs fine-tuning specialization

The 2,788% surge in MCP-skilled freelancers: the community is already betting on tomorrow's AI infrastructure.

Model Context Protocol reveals the sharpest supply-demand divergence in AI: freelancer adoption exploded 2,788% while client demand remains negligible. Introduced by Anthropic in late 2024, MCP standardizes how AI agents connect to data sources and tools, promising to reduce integration complexity like REST APIs did for web services. But enterprise demand is lagging as organizations focus on simpler first-generation agents that don't yet require protocol standardization.

Fine-tuning collapses

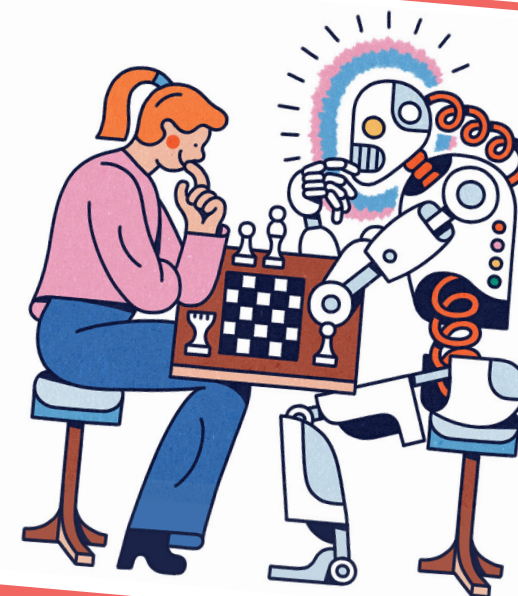
The 69% fine-tuning collapse reflects market maturation as foundation models improved in quality and RAG became commoditized. Analyzing our briefs, we observe that fine-tuning is still used for highly specialized use-cases: proprietary AI products (tech-native startups), domain-specific language (healthcare, legal, scientific vocabularies), or cost-optimization at scale.

Artificial intelligence deep-dive

The two-speed reality widens

2025 exposed AI's structural divide: enterprises standardizing today's infrastructure while freelancers master tomorrow's. This gap isn't closing, it's widening. What's certain is that Python has won as GenAI's default language and RAG has become a commodity (129% growth). Certainty has also become reality when it comes to agents moving to production (60x demand growth) and MLOps being now non-negotiable for industrialization (178% growth).

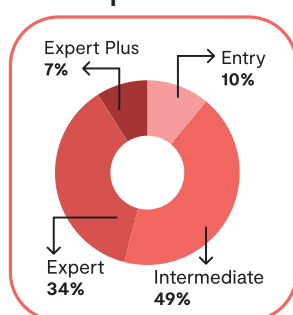
On the contrary, fragmentation remains when it comes to orchestration frameworks (LangChain losing share despite growth), vector databases (no player above 26% share), LLM providers (OpenAI bleeding 18 points to competitors) and monitoring tools with the traditional ML vs. GenAI-native split. The gap between what enterprises are deploying and what freelancers are learning will define 2026's market dynamics. Organizations optimize for stability while talent optimizes for positioning. The two-speed market isn't dysfunctional, it is the inevitable outcome when innovation outpaces infrastructure maturity.



The AI Engineer Expert

The ML Ops portrait

Experience



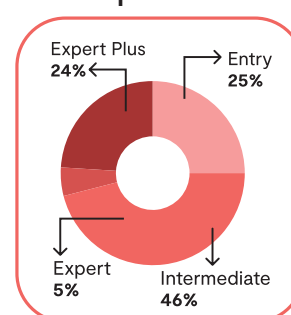
+63%
Supply

€650
Median
daily rate

Freelancers top 5 skills

Python **+53%**
Machine Learning **+48%**
Docker **+55%**
AWS **+62%**
Deep Learning **+47%**

Experience



+229%
Supply

€600
Median
daily rate

Freelancers top 5 skills

Python **+199%**
Machine Learning **+146%**
Data Science **+126%**
Deep Learning **+111%**
LLM **+279%**

Market experts



**Adriana
Kosowski**

AI Program
Manager

“

Agentic AI is not just a technological shift, but a transformation in how organizations operate. What I often see is that organizations still approach it through isolated use cases, instead of defining a clear vision and investing in the right foundations. The role of AI leaders is no longer to manage delivery, but to build those foundations: skills, processes, and platforms that enable autonomous systems to create value at scale.



**Justin
Tan**

AI Strategy,
Transformation,
and Training

“

Leaders redesigning operating models ask what AI can automate, but rarely ask what those tasks were quietly building. The most critical element that is underestimated is the judgment pipeline — the years of hands-on, repetitive practice through which professionals develop the pattern recognition that lets them sense when something is wrong, even when the data looks right. Yet the more organisations rely on AI, the more they need exactly this kind of human judgment to oversee, challenge, and course-correct. Strip too many of those formative experiences away in the name of efficiency, and in a few years you will have an organisation that depends on human judgment more than ever but has stopped producing the people capable of exercising it.

Conclusion by Claire Lebarz – CTO, Malt

Work is being rewritten, not replaced. How is your company organizing intelligence?

Over the past two years, artificial intelligence has moved from experimentation to widespread adoption. It is now present across functions, industries, and company sizes. But the dominant question of “whether AI will replace jobs” is the wrong one. What we are observing is not a substitution of humans by machines, but a deeper shift: AI is rewriting where value sits within human work.

We have entered a period of deep structural realignment where value no longer resides in the ability to execute a task, but in the capacity to design the systems that perform it. At Malt, this transformation is visible in the fundamental redistribution of tech skills where technical prowess is no longer the sole driver of value. Across the platform, the share of profiles highlighting historically dominant languages like JavaScript has declined by 20% to 30% in a single year as the “Builder Mindset” evolves into an “Orchestrator Mindset”. We are seeing a collapse of the traditional silo between data and engineering; backend developers have now overtaken data scientists in the transition to “AI engineers” – blurring the boundaries that once structured organizations. This shift has created a significant premium for double expertise. The market is now rewarding “super-connectors” who pair deep domain knowledge in areas like marketing or business strategy with technical mastery of automation and low-code orchestration. These professionals aren’t just building prototypes; they are deploying autonomous AI Agents capable of active workflow execution.

The transformation we’re witnessing is not technical, it is organizational.

Tech teams’ competitive advantage used to be defined by the size of the engineering team or the maturity of the tech stack. In 2026, the new moat is Intelligence Liquidity: the ability to flow the right AI automation and human expertise into the right problem at the precise moment it is needed. To achieve this, leaders must move beyond the “Build vs. Buy” dilemma toward a “Compose” strategy. This means building a porous organization that seamlessly integrates AI and external expertise into internal core teams.

The question is no longer whether AI will remodel your work or your team – that transformation is already happening. The question for every CTO and tech leader today is the following: Is your current organization a rigid container built for a world of execution, or an evolutionary system designed for a world of orchestration? In this new era, our role has fundamentally shifted. We are no longer just managing code, infrastructure, or roadmaps. We are choreographing intelligence. Our collective success will be measured by how effectively we harmonize human ingenuity with machine autonomy to create a system that doesn’t just work but learns, adapts, and scales.



Methodology

The Malt Tech Trends 2026 report is grounded in the real-world behavior of Europe's largest independent tech community. By analyzing the interactions between over 1,000,000 registered freelancers (including 250,000 tech and data experts) and more than 90,000 companies, we provide a high-resolution map of where the tech economy is moving.

Our analysis covers the full geographical footprint of Malt, including the European Union, the United Kingdom, and the Middle East. This edition specifically compares data from 2025 vs. 2024 to capture the shift from experimental AI to deep operationalization. While the core focus remains on Tech & Data, we also tracked the penetration of technical requirements into non-tech roles, such as marketing and management consulting. We analyzed tech skills across the entire platform, including their usage by non-tech profiles.

To ensure a comprehensive view of the ecosystem, our study synthesizes three major data domains:

1. **Project Briefs:** Structured data from thousands of project descriptions provided by companies, detailing specific mission goals, required job titles and mandatory and bonus skills.
2. **Keyword Search Events:** Millions of search events that signal real-time market interest and emerging technology trends before they result in formal briefs.
3. **Freelancer Profiles:** An analysis of profile evolutions and upskilling patterns within our community of +250,000 tech and data experts.

How evolutions are computed

Our marketplace has been in continuous expansion since its creation.

Every year, we collect more project briefs, more searches are performed and our freelancers community keeps on growing. In order to create meaningful insights, we normalized all growth rates provided in this report to eliminate the mechanical growth effect of our marketplace and capture accurate market trends. Illustration with fake figures:

- number of tech freelancers with skill A in 2024: 23 152
- number of tech freelancers with skill A in 2025: 34 678
- total number of tech freelancers in 2024: 220 568
- total number of tech freelancers in 2025: 256 234
- not normalized growth of skill A: +49,7%
- normalized growth of skill A: +28,9%

The Malt Tech Skills Index

This index tracks the market share evolution of specific skills across the entire marketplace. The demand is calculated based on the frequency of skills appearing in project descriptions. The supply is calculated based on the number of freelancers declaring those skills on their profiles.

The Malt Quadrants

Our tech quadrants visualize the relationship between Growth and Volume. These visualizations utilize a logarithmic scale. The main quadrant displays the evolution of our clients demand based on the project briefs we received throughout 2024 and 2025. We used the same metric to compute the "Data Platform" quadrant.

The other specific quadrants (Cloud & Infrastructure, AI, Low-code / No-code) rely on keyword searches, they are more to be interpreted as "hype quadrants" on Malt as they bundle together searches performed by clients, freelancers and unlogged users.

The Report team

A sincere thank you to the internal team and external experts who made the Malt Tech Trends 2026 report possible. We are deeply grateful to all the Malters involved for their data analysis, strategic insights, writing and design excellence.

Special thanks to our external contributors whose specialized expertise in AI, tech and digital transformation provided the essential context for this year's "Operationalization Era". Your collective vision has helped us map the shift from "Builders" to "Orchestrators," ensuring this report remains the definitive guide for Europe's tech ecosystem.



Benoit Guillon
VP of Engineering



Raphaëlle Beguinell
Head of Content & Strategic Insights



Anaïs Ghelfi
VP Platform & Agentic systems



Rae Lakey
Senior Brand Designer



Claire Lebarz
Chief Technology Officer



Florent Edouard
Global Head of the Digital Accelerator, Sanofi



Alexander Gottschlich
Platform and Cloud Architect, Elastic2Is



Ludovic Dubois
Cloud FinOps Analyst



Alain Duval
Domain Lead & Cloud Product Manager, BPI France



Christophe Blefari
Staff Data Engineer & Founder, Nao Labs



Adriana Kosowski
AI Program Manager



Jordi Bufí Caballero
Transformación Digital, Agile Coach & Scrum Master



Jehanne Dussert
Tech Lead GenAI, AI Governance Lead



Justin Tan
AI Strategy, Transformation, and Training



About Malt

Malt is Europe's leading freelance management platform, co-founded in 2013 by Vincent Huguet (CEO). Over 90,000 companies of all sizes source, contract and manage external talents from Malt's community of more than 950,000 highly qualified independent experts across every field – from tech & data to marketing and communication, to management consulting.

Finding the right freelancer takes just seconds with Malt AI Search, contracting and payment are seamless, with built in reporting and compliance, making Malt an end-to-end solution for freelance management. Operating across 9 countries in Europe and the Middle East, Malt achieved a business volume of over €800 million in 2024.

malt.com

communication@malt.com