



ENTEEF

Fostering Entrepreneurship through Freelancing

Global Freelancer Market Report: Comparison of Europe and Asia

This document sets out to provide a concise comparative overview of the freelance labour market in Europe and Asia, summarising the key findings from the ENTEEF+ research study. It highlights how offline national environments shape online freelancing participation, examines the structure of supply and demand across regions, and presents specific insights from six project countries. The aim is to offer a clear and accessible understanding of major trends, challenges and opportunities in the global freelance economy, supporting further work on skills development and educational resources for freelancers.

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Methodology

The study collected data from Upwork using web scraping techniques to analyse real freelance profiles and job postings. The dataset includes information on:

- 4,724 top-rated freelancers from Europe and Asia
- 10,534 freelancers across six project countries (Poland, Romania, Spain, Serbia, Ukraine, and Indonesia)
- Over 33,000 job postings from around 160 countries

The analysis focuses on professional specialisation, hourly rates, geographic distribution, experience, gender, and demand patterns. It also integrates secondary data related to economic performance, innovation, digitalisation, human capital and regulatory context. Although the freelance economy is digital, these offline factors heavily influence its structure and outcomes.

How Offline Environments Shape Freelancing

Economic conditions strongly influence participation in freelancing. In countries with strong labour markets and stable employment, freelancing tends to be chosen for flexibility and career development. In places with limited job opportunities or instability, freelancing becomes a necessity. Innovation performance and digitalisation play major roles in shaping demand: economies with high technological advancement generate more requests for specialised freelance services.

Human capital is another decisive factor. Countries with high levels of education and digital skills are more competitive internationally. National culture also matters. For example, societies with a strong preference for security and predictability may be less likely to choose freelancing, which requires tolerance for uncertainty. Regulatory frameworks differ widely: some countries provide clear rules and tax structures for freelancers, while others leave important areas undefined, increasing risk.

Supply Side: Freelancers in Europe vs Asia

The distribution of freelancers worldwide shows clear regional differences. Asian countries represent the largest supply of freelancers globally, especially India, Pakistan, Bangladesh and the Philippines. These countries have rapidly growing freelancer communities, strong technical skills in IT and customer service, and highly competitive hourly rates. Europe has a much smaller freelancer population, but a higher concentration of experienced specialists in areas such as business consulting, finance, engineering, and advanced creative services.

Professional Structure

Across both regions, software development and IT are the most dominant categories, followed by creative and multimedia work, writing and translation, digital marketing, and administrative support. Asian freelancers are particularly visible in programming, web development, and customer support roles, while European freelancers appear more strongly in high-skill categories such as engineering, architecture, consulting, and marketing strategy.

Earnings

Hourly rates differ significantly. European freelancers generally charge more due to higher living costs, strong professional backgrounds and more favourable client perception in specialised areas. Software developers earn the highest rates in both regions, followed by digital marketing and business consulting. The lowest-paid categories are writing, translation, basic administrative support, and short micro-tasks.

Experience level strongly influences income. Freelancers with long work histories and strong ratings command the highest fees, while beginners (particularly in Asia) often set low prices to remain competitive in saturated markets.

Gender

The report identifies gender imbalances. Women are more frequently represented in lower-paid fields such as writing, translation and administrative support, while men dominate higher-paid technical professions. As a result, men earn more on average in both Europe and Asia. The gap is wider in Europe, where the difference between fields is larger, although both continents struggle with gender equality in access to high-earning roles.

Demand Side: Where Jobs Come From

Demand for freelance services is concentrated in highly developed countries. The majority of job postings come from the United States, the United Kingdom, Canada, Australia, and Germany. These clients seek skilled professional work and pay higher rates. Job postings emphasise experience, client reviews, language proficiency, and technical expertise.

Software development remains the highest-demand sector, followed by digital marketing and multimedia production. Higher-paying projects are generally long-term and require specialist expertise, while short-term one-off tasks offer lower compensation. Freelancers worldwide rely heavily on international demand, as local opportunities tend to be fewer and less profitable.

Findings from Project Countries

Indonesia represents a rapidly growing freelance market in Asia, driven by a young population and strong digital adoption. The country has high participation in creative fields, social media and design roles. However, infrastructure and skill limitations still restrict access to advanced roles, and earnings are lower compared to Europe.

Poland has a stable labour market, low unemployment and a strong pool of educated workers. Freelancing is often pursued for flexibility rather than necessity. The country has moderate digital skills and a relatively high presence in software development. However, a very high level of uncertainty avoidance in Polish culture discourages risk-taking, reducing freelance participation.

Romania shows growing involvement in freelancing and strong ICT development. The digital economy is expanding and remote work is increasingly common. Romania performs well in innovation indicators compared to similar economies. Freelancers work mostly in creative fields, software and translation, with rising global competitiveness.

Serbia is one of the most active European countries in the global gig economy relative to population. Many freelancers turn to digital platforms due to limited local job opportunities. Serbia is highly competitive in software development and foreign language services. Earnings are generally lower than in the EU but high relative to local wages.

Spain has one of the highest unemployment levels in Europe, which motivates freelancers to seek alternative work options. Digitalisation is improving but still uneven. Spain shows strong growth in creative and multimedia services and an increasing number of freelancers in marketing and business support. Regulatory complexity remains a challenge.

Ukraine freelance market expanded significantly, driven by economic instability and war-related disruption. Freelancing offers access to global income and remote safety. Ukraine has a strong IT sector and excellent technical education, which makes its freelancers highly competitive. Digitalisation initiatives have accelerated even during conflict.

Conclusions

The comparison reveals a sharp contrast between the two regions: Asia dominates in the number of freelancers and cost-competitive services, while Europe specialises in high-value professional expertise. Nonetheless, both regions face similar challenges related to job stability, competition and access to legal and social protection. Offline national differences (economic, cultural and institutional) continue to strongly shape online market participation.

The findings form a basis for the next ENTEEF+ project stages, including competency development and online learning resources, which will help freelancers strengthen their skills and better navigate the global digital labour market.

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