The Ecosystem

Austria's AI workforce at a glance

97 %

of firms employ zero AI workers

The question is no longer whether Austria has AI talent. It is whether the base is growing fast enough, retaining enough, and diffusing broadly enough.

4,082	40.5 %	#3 / 38	~320 / yr
Core AI specialists (2025)	Core share of AI ecosystem	Core share rank in Europe	Net Core AI additions (flat)

EXECUTIVE SUMMARY

The policy question is no longer whether Austria has AI talent — it is whether the base is growing fast enough, retaining enough, and diffusing broadly enough. Austria now counts 4,082 Core AI practitioners across Build, Enable, and Integrate tiers, making it one of the most technically concentrated AI workforces in Europe. But growth is decelerating, net additions remain flat at roughly 320 per year, and 97 % of Austrian firms still have no AI staff at all. This chapter maps the ecosystem's scale, structure, and dynamics.

POLICY IMPLICATIONS

Accelerate the Build-tier pipeline. Expanded AI master's capacity, doctoral fellowships, and compute access at Austrian universities. The Build tier (1,122 specialists) is Austria's scarcest strategic resource.

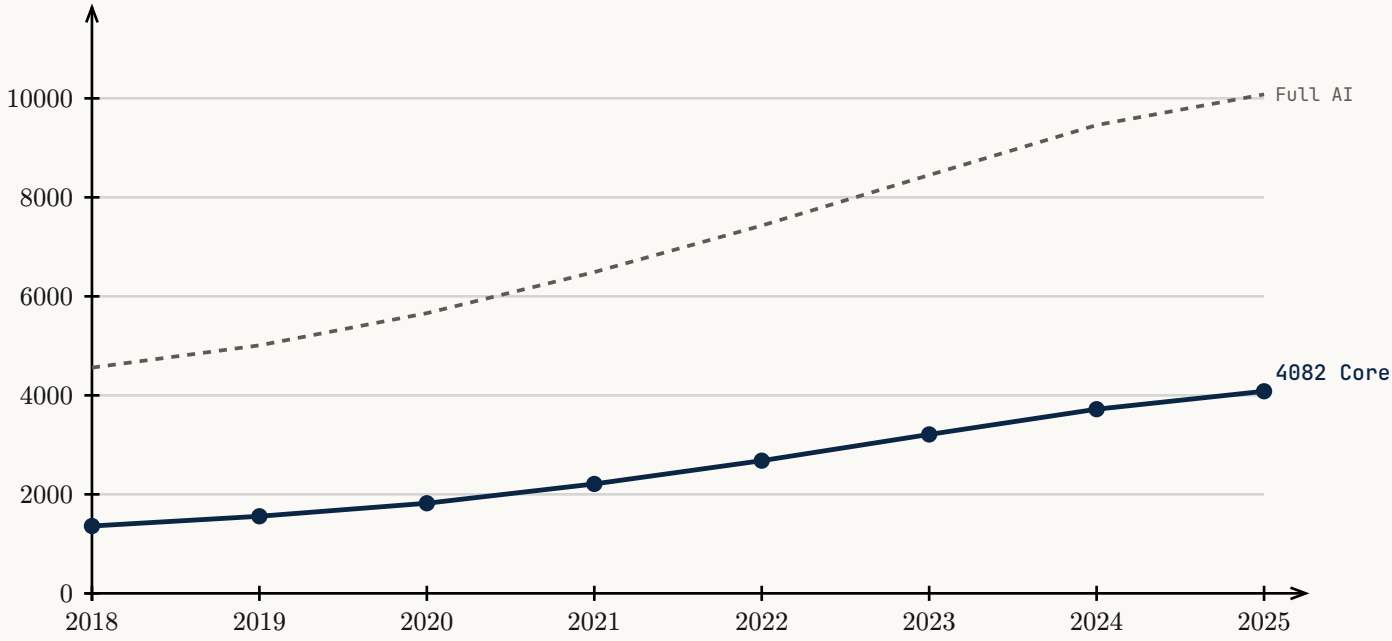
Close the SME adoption gap. Targeted AI readiness programs, shared infrastructure, and advisory services for firms with 10–250 employees. Only 3.2 % of firms have any AI staff — diffusion is the binding constraint.

Address the retention gap. Net additions of roughly 320 per year will not deliver the scale Austria needs. Retention interventions — career progression, competitive compensation, R&D tax credits — are as important as recruitment.

EXHIBIT 1.1

Austria's AI Workforce, 2018–2025

Austria's AI ecosystem has more than doubled since 2018 — but the real story is beneath the headline. Core AI practitioners, those whose primary role involves building, enabling, or integrating AI, grew even faster than the broader workforce, tripling from 1,320 to 4,082.



Source: Revelio Labs via WRDS

KEY FINDINGS

- Total AI workforce grew from roughly 4,400 to 10,300 (12.7 % CAGR); Core AI grew from 1,320 to 4,082 (17.5 % CAGR).
- Core AI is growing faster than the periphery (17.5 % vs 12.7 % CAGR) — Austria's workforce is becoming more technically concentrated, not just bigger. The Core share rose from 29.8 % to 40.5 %.
- Growth is decelerating: year-over-year additions peaked in 2019 and have slowed to near-flat in 2024.

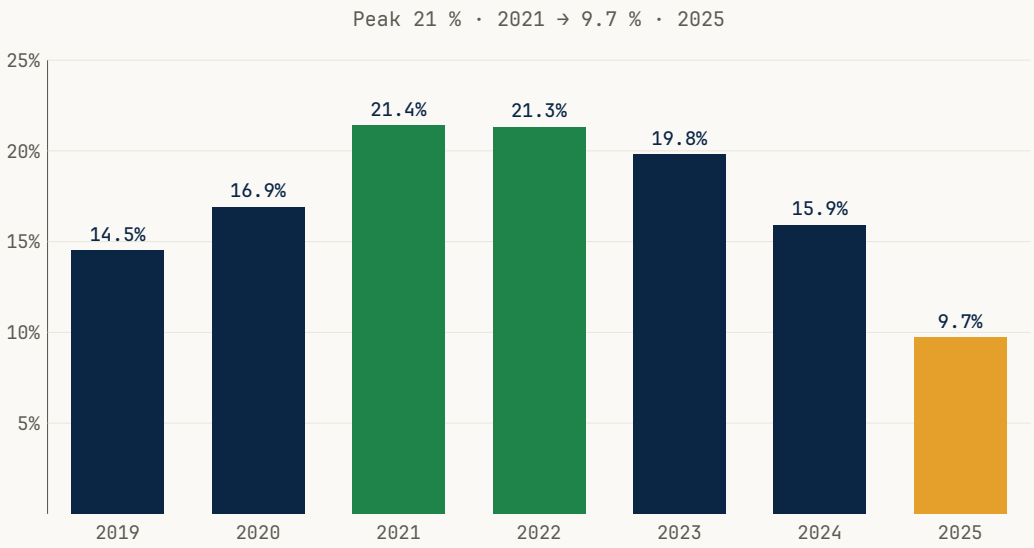
IMPLICATION

Sustaining this growth trajectory requires expanding the pipeline at both ends — more AI master's graduates entering and stronger retention keeping experienced practitioners in Austria.

EXHIBIT 1.2

Year-over-Year Growth

The headline growth numbers mask a deceleration that demands attention. After surging at 14.5 % in 2019, year-over-year growth has steadily slowed — and the preliminary 2025 reading, while distorted by data lag, underscores that Austria cannot coast on momentum alone.



Source: Revelio Labs via WRDS

KEY FINDINGS

- Growth peaked at 21.4 % in 2021 and has decelerated to 9.7 % by 2025 (preliminary).
- The 2025 figure reflects preliminary data collection, not actual workforce contraction. Revelio's lag in capturing recent hires means the true 2025 growth rate is likely positive but below the 2018–2023 trend line.
- Core AI growth has consistently outpaced total AI growth, indicating quality deepening even as expansion slows.

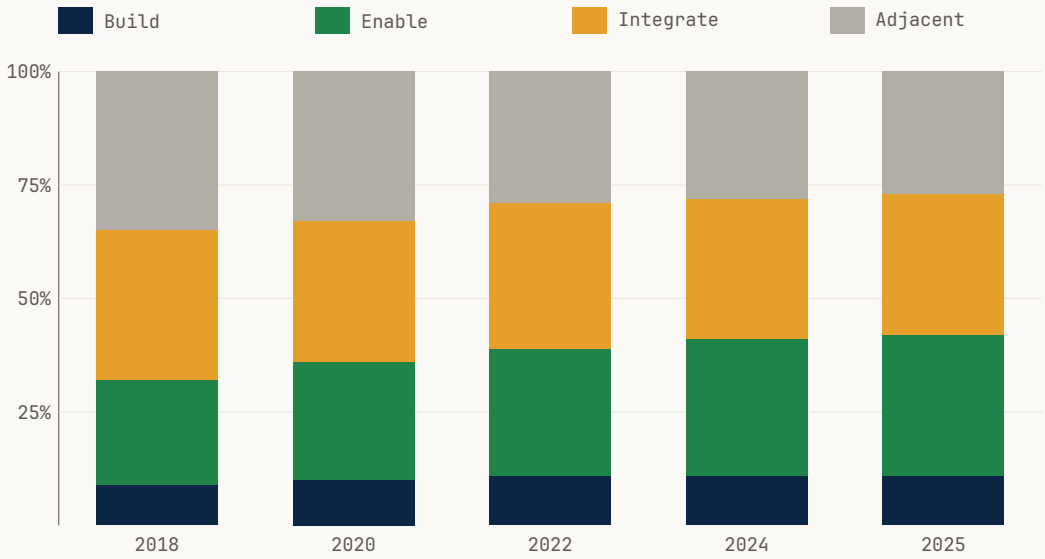
IMPLICATION

Deceleration is not yet decline, but the window for intervention is narrowing. Policymakers should treat the current plateau as a call to action, not a sign of maturation.

EXHIBIT 1.3

AI Workforce by Tier

Not all AI roles are created equal. Austria's taxonomy distinguishes between those who build AI systems, those who enable the infrastructure, those who integrate AI into business processes, and those in adjacent roles. The composition shift tells a story of maturation: the Adjacent tier is shrinking, while the technical core is consolidating.



Source: Revelio Labs via WRDS

KEY FINDINGS

- Enable and Integrate now dominate at roughly 31 % each, reflecting enterprise AI adoption across Austrian industry.
- Build tier holds steady at roughly 11 % (1,122 specialists) — a small but critical research and development base. These are the ML engineers, computer vision specialists, and AI researchers who create frontier systems rather than deploy existing ones.
- Adjacent roles declined from 35 % to 25 % of the ecosystem, a healthy sign of workforce specialisation.

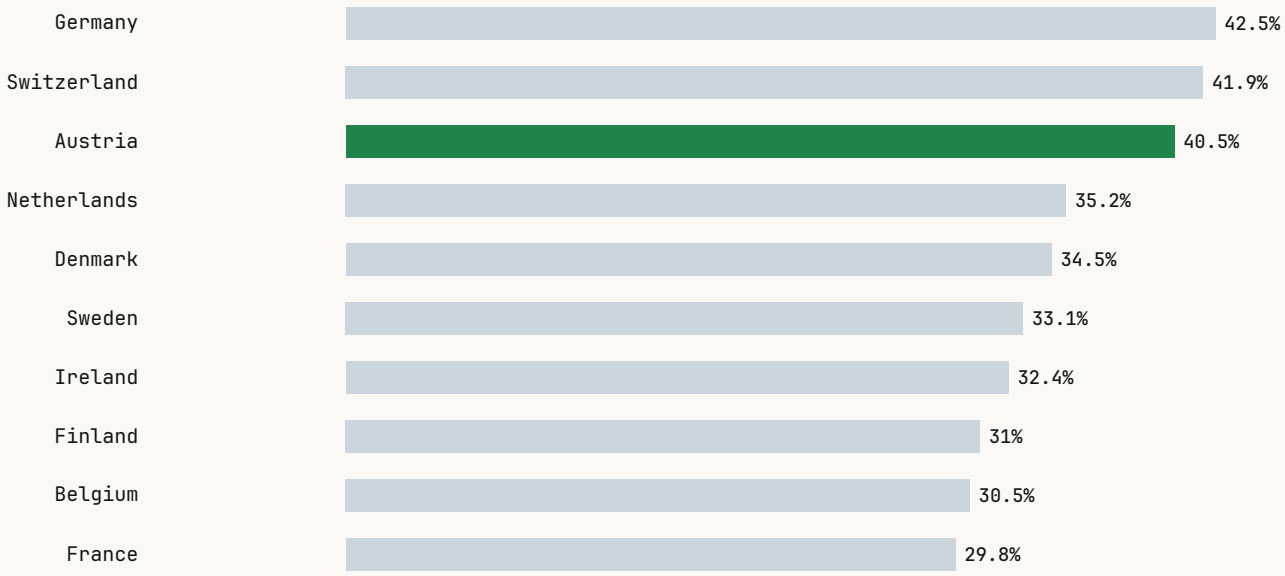
IMPLICATION

The Build tier is Austria's scarcest and most strategically important layer. Expanding it by even 200–300 specialists would meaningfully shift the country's capability frontier.

EXHIBIT 1.4

Core AI Share — Austria vs Europe

Austria's most distinctive competitive position in Europe is not its scale — it is its depth. Among 38 European countries, Austria ranks #3 in Core AI share: the proportion of its AI workforce in specialised roles rather than peripheral ones. Only Germany and Switzerland concentrate their AI talent more intensely.



Source: Revelio Labs via WRDS · 38 European countries benchmarked

KEY FINDINGS

- Austria's Core share (40.5 %) places it #3 in Europe, behind only Germany (42.5 %) and Switzerland (41.9 %).
- The DACH region is remarkably homogeneous on this metric: Germany (42.5 %), Switzerland (41.9 %), and Austria (40.5 %) form a tight cluster — Austria competes at the region's depth standard rather than trailing it.
- Core share has risen from 29.8 % (2018) to 40.5 % (2025) — a 10.7 percentage-point improvement in seven years.

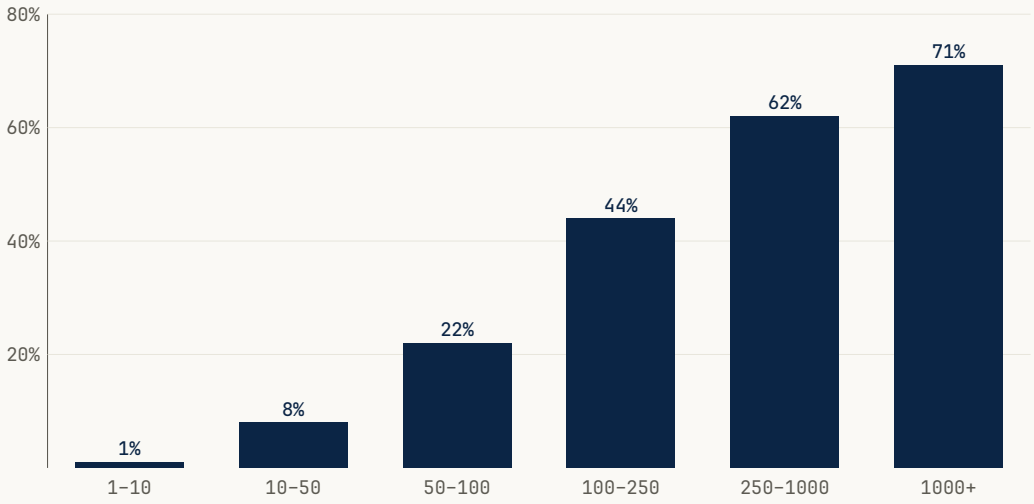
IMPLICATION

Protect this quality advantage as Austria scales. Expanding the workforce through lower-skill Adjacent roles would dilute the core share that makes Austria distinctive.

EXHIBIT 1.5

AI Adoption by Firm Size

Austria's AI talent is concentrated at the top. While 71 % of firms with 1,000+ employees have at least one AI professional on staff, adoption drops precipitously at smaller scales. The gap between Austria's AI leaders and its vast SME base is the ecosystem's central structural challenge.



Source: Revelio Labs via WRDS · employer data from 2022 firm-year panel

KEY FINDINGS

- 71 % of large firms (1,000+ employees) have AI staff vs. only 1 % of micro firms (1–10 employees).
- A handful of large firms anchor Austria's Core AI employer landscape, with the top three each employing 40–80 specialists.
- Specialised niche firms achieve extraordinary AI density: some dedicate up to 30 % of their workforce to Core AI.

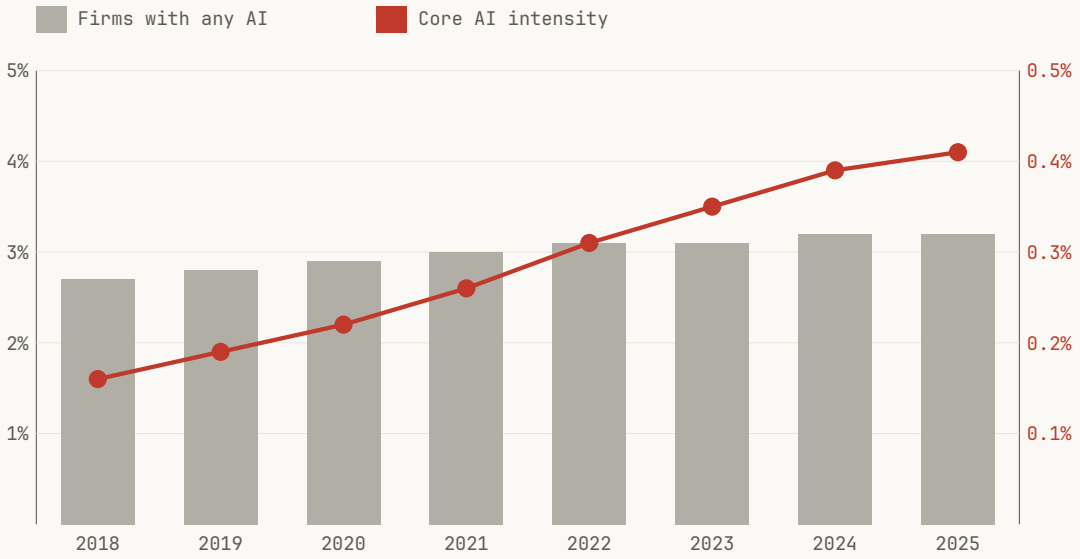
IMPLICATION

Close the SME adoption gap with targeted AI-readiness programs, shared infrastructure, and sector-specific advisory services. Not every firm needs internal AI teams — transfer centres can bridge the gap.

EXHIBIT 1.6

AI Penetration in Austria's Economy

Behind the growth headlines lies a sobering structural reality. Austria's AI expansion has happened largely within existing AI-adopting firms, not across new ones. The share of firms with any AI presence has barely moved in seven years.



Source: Revelio Labs via WRDS · firm data from 2022 panel

KEY FINDINGS

- Only 3.2 % of all Austrian firms (about 3,425 of 107,532) employ anyone in an AI role.
- Core AI intensity more than doubled (0.16 % → 0.41 %), but from an extremely low base. Growth has been driven by deepening within existing AI-adopting firms, not by new firms entering the AI space — a pattern that reinforces concentration risk.
- The flat firm-adoption curve means Austria's AI revolution is a phenomenon of the few, not (yet) the many.

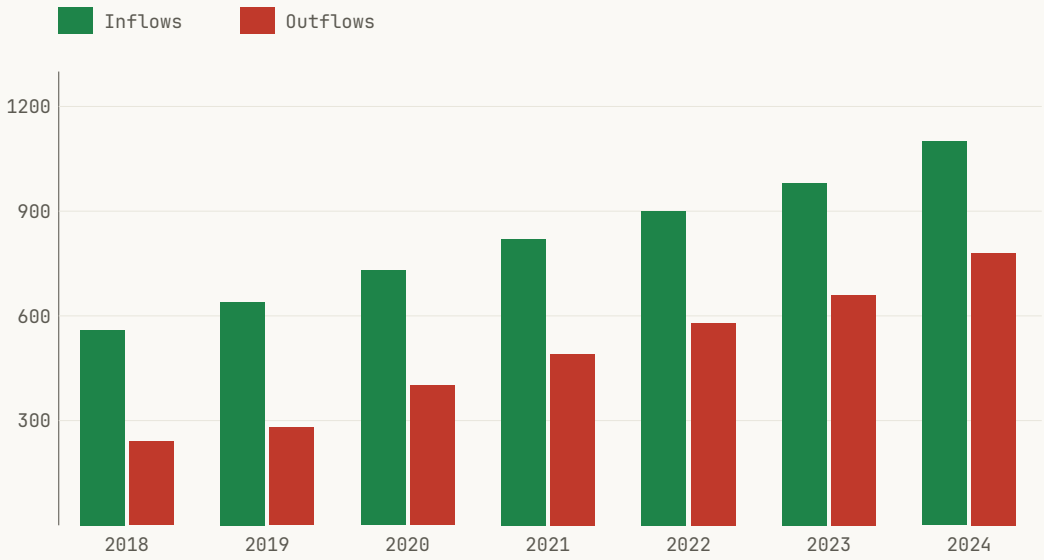
IMPLICATION

Diffusion policy is as important as capability policy. Austria needs a strategy to bring AI into the remaining 97 % of its firm base — starting with the Mittelstand.

EXHIBIT 1.7

Talent Flows: 2018 vs 2024

Austria's AI hiring pipeline is working — but the leak is growing faster than the pipe. Inflows nearly doubled between 2018 and 2024, but outflows more than tripled. The result: net additions remain stubbornly flat at roughly 320 per year, a rate that would take over a decade to double the current Core AI base.



Source: Revelio Labs via WRDS

KEY FINDINGS

- Inflows grew from roughly 560 to 1,100 (nearly 2×); outflows grew from 240 to 780 (3.3×) — the gap is widening.
- Integrate tier shows the largest absolute outflows, making it the leakiest part of the pipeline.
- Net additions of about 320 per year have been remarkably stable since 2018 — a ceiling, not a floor.

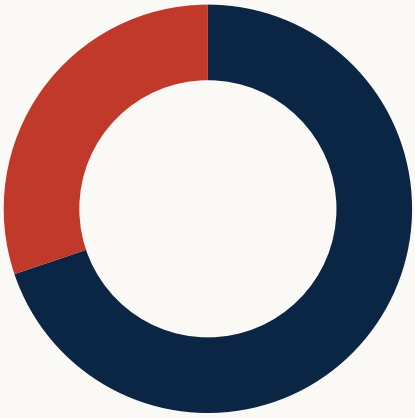
IMPLICATION

Retention-focused instruments — career-progression pathways, competitive compensation for mid-career specialists, AI-focused R&D tax credits — may yield higher returns than expanding university intake alone.

EXHIBIT 1.8

Domestic vs Multinational AI Employment

Austria's AI ecosystem rests on two pillars: domestic firms that employ 70 % of Core AI workers, and foreign-headquartered multinationals that contribute the remaining 30 %. This structural duality is both an asset — multinationals bring global knowledge and scale — and a vulnerability.



Austrian-HQ · 2850 Foreign-HQ · 1232

Source: Revelio Labs via WRDS

KEY FINDINGS

- Austrian-HQ firms employ 2,850 Core AI workers domestically (69.8 %); foreign-HQ multinationals account for 1,232 (30.2 %).
- Austrian firms also employ 1,482 Core AI workers abroad — an international network that could channel knowledge back.
- Concentration risk: a handful of multinationals account for a disproportionate share; a single relocation decision could be disruptive.

IMPLICATION

Use multinationals as spillover channels — training partnerships, supplier upgrading, talent circulation — while building Austrian-headquartered alternatives. Diversifying the employer base hedges against concentration risk.

Method, sources, taxonomy.

This analysis draws on individual-level workforce data from Revelio Labs, accessed via Wharton Research Data Services (WRDS). Revelio aggregates professional profiles from LinkedIn, XING, and other networks, enriched with machine-imputed salaries, predicted gender, education records, and role classifications. The dataset covers 1.9 M+ employment records connected to Austrian firms across 2018–2025.

PARAMETERS

Data provider	Revelio Labs via WRDS
Time period	2018–2025 (8 years, 2025 preliminary)
Core AI taxonomy	approx. 120 roles across Build, Enable, Integrate
Full AI taxonomy	approx. 370 roles across Build, Enable, Integrate, Adjacent
Primary segment	austria_located (workers physically in Austria)
Revelio coverage	approx. 22.5 % of Eurostat official employment (~4.49 M)
Total employment records	1.9 M+ individual positions
Core AI stock (2025)	4,082 professionals (preliminary)
Firms in panel	107,532 (of which 3,425 have any AI staff)