Brain Drain

Where Austria's AI talent goes, and why

23.3 %

of NLP / GenAI leaves Austria

82 % of AI careers stay in Austria. The real story is frontier leakage: 17 % of Build, 23 % of NLP / GenAI, 44 % gone within twelve months.

56.6 %
Same-firm retention

12.5 %
Brain drain rate

17.2 %
Build-tier drain rate

44 %
Leave within first 12 months

EXECUTIVE SUMMARY

The brain-drain narrative is real but overstated. Austria keeps eight in ten AI career trajectories inside its labour market, and the brain-drain rate is stable around 12.5 %. But the risk is concentrated where it matters most: Build-tier roles show a 17 % drain rate, NLP & Generative AI reaches 23 %, and 44 % of all international departures happen within the first 12 months. The policy response must be targeted, not generalised — front-loaded retention for frontier roles, not blanket subsidies.

POLICY IMPLICATIONS

Prioritise frontier-role retention. Build (17.2 %), NLP/GenAI (23.3 %), and Core ML Research (16.9 %) are Austria's most vulnerable capability pockets. Dedicated retention instruments — compute access, research sabbaticals, international collaboration grants — would yield the highest strategic return.

Front-load the retention investment. 44 % of brain drain happens within 12 months. Onboarding, mentorship, and promotion clarity must start in month one. The 3–8 year experience band is the retention battleground.

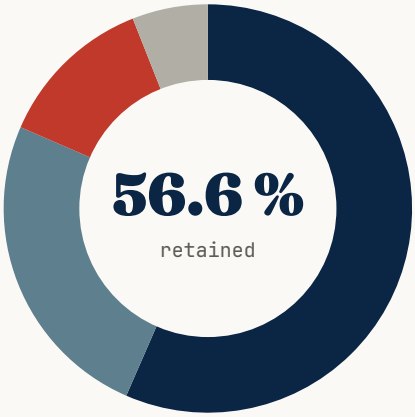
Differentiate by destination corridor. Germany requires ecosystem stickiness — career options, cluster depth. US and Switzerland require compensation competitiveness. Don't apply one-size-fits-all retention to different pull dynamics.

Build ecosystem density as a structural hedge. More AI employers, more career options, more cluster depth. This makes Austria organically stickier by reducing the career premium of relocation.

EXHIBIT 3.1

Retention Overview — The Big Picture

The brain-drain narrative requires calibration, not alarm. On the v5+ AI-only career-trajectory panel, Austria keeps 56.6 % of observed AI workers in the same firm and another 25.0 % in domestic firm-to-firm moves — eight in ten stay in the country. Brain drain accounts for 12.5 % (2,309 trajectories), and 6.0 % left the workforce or are unclassified. The shift in retention vs domestic-churn vs the prior dataset reflects better visibility of inter-firm moves, not a fundamental change in mobility.



Retained · 56.5%
Brain drain · 12.5%
Domestic churn · 25%
Unclassified · 6%

Source: Revelio Labs via WRDS · austria_located segment

KEY FINDINGS

- Roughly one in eight AI trajectories leaves Austria — meaningful but not dominant. Same-firm retention (57 %) plus domestic firm-to-firm moves (25 %) means roughly eight in ten AI workers stay inside Austria's labour market.
- Brain drain (12.5 %) is half the size of domestic churn (25.0 %), indicating that Austria has a functioning internal AI labour market where professionals change employers without leaving the country.
- Core AI and Full AI show almost identical retention patterns (57.0 % vs 56.6 %), meaning the problem is consistent across technical depth levels — it is not a phenomenon of peripheral AI roles alone.

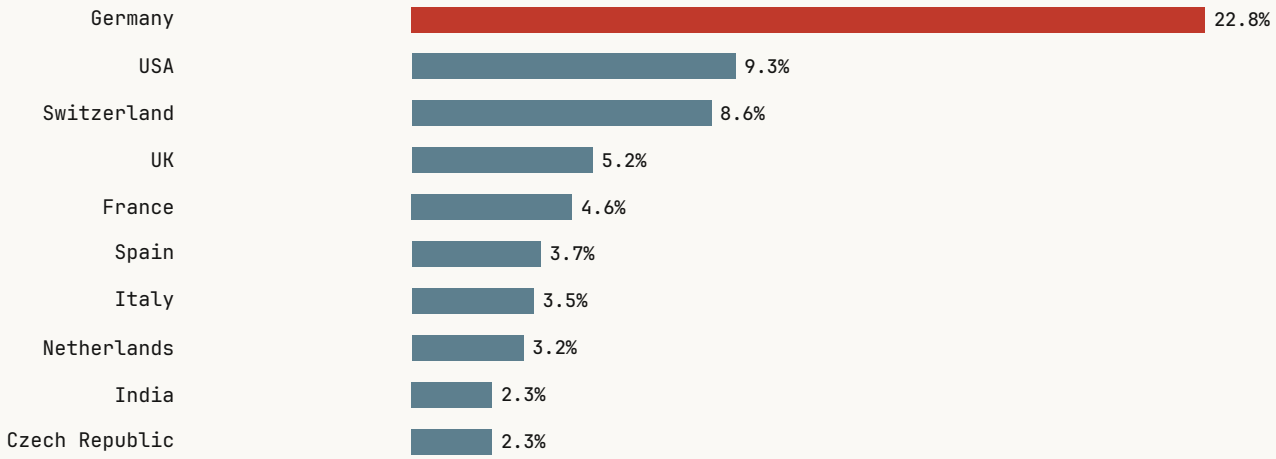
IMPLICATION

Frame the narrative accurately: Austria has a retention challenge, not a retention crisis. The data supports targeted intervention for specific risk pockets, not economy-wide alarm or blanket subsidies that would be both expensive and poorly targeted.

EXHIBIT 3.2

Where They Go — The Geography of Outflow

The geography of outflow is policy-relevant because it reveals distinct pull dynamics that require different retention responses. Germany absorbs the largest outflow by far (527 departures, 23 % of all brain drain), driven by deep DACH labour-market integration, language proximity, and ecosystem scale. The United States (215) and Switzerland (198) are smaller in volume but exert the strongest salary pull.



Source: Revelio Labs via WRDS · share of total brain-drain departures

KEY FINDINGS

- Germany dominates by volume (527 departures, 23 % of total) but this reflects DACH labour-market integration and geographic proximity, not a pay differential — the median salary uplift to Germany is just +1 %.
- The US (215 departures) and Switzerland (198) are the compensation magnets: +46 % and +39 % median salary uplifts respectively, with 75–76 % of movers receiving a raise — the corridors where targeted retention tools are most defensible.
- The long tail of European destinations (UK, France, Netherlands) absorbs hundreds of departures at modest or negative median salary changes (-3 % to -10 %) — suggesting career optionality and lifestyle factors, not compensation, drive these moves.

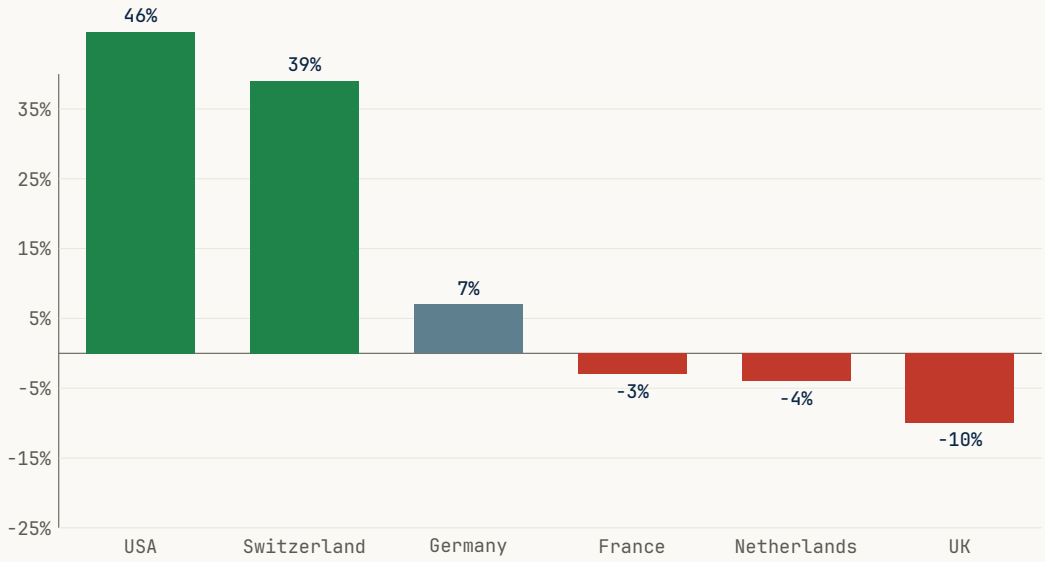
IMPLICATION

Differentiate retention strategies by corridor. Germany requires ecosystem stickiness — more career options, deeper AI clusters. US and Switzerland require compensation competitiveness and frontier-research access.

EXHIBIT 3.3

The Economics of Leaving — Salary Outcomes by Destination

Salary outcomes vary sharply by destination, and the variation itself is the policy signal. For Germany — the largest destination — the median uplift is +7 %, with 56 % of movers receiving any raise. By contrast, the US delivers +46 % and Switzerland +39 %. Critically, several European destinations come with median pay cuts: the UK (-10 %) and France (-3 %) — implying that international mobility for these corridors reflects career optionality, not financial gain.



Source: Revelio Labs via WRDS · machine-imputed salaries · USD → EUR at ECB annual avg rate

KEY FINDINGS

- Germany is an ecosystem pull, not a pay pull: +7 % median uplift, 56 % get a raise. Talent moves for career options, firm prestige, and DACH market integration — not for money.
- US (+46 %, 75 % get a raise) and Switzerland (+39 %, 76 %) are the clear compensation-sensitive corridors. These movers are economically rational — and the hardest to retain without matching the financial offer.
- Leavers are not Austria's highest earners ex ante. Median pre-departure salary is €60 K for brain drain vs €65 K for stayers — the mid-career, mid-salary cohort is most mobile, not top performers.

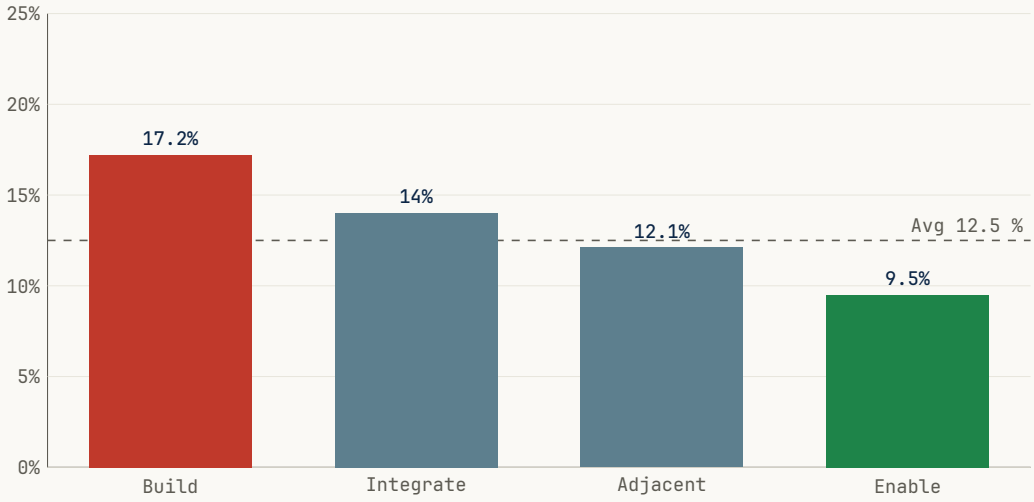
IMPLICATION

Compensation-based retention is only defensible for US- and Switzerland-bound movers — roughly 413 departures, or 18 % of total brain drain. For the remaining 84 %, the answer is ecosystem depth, career progression, and research infrastructure, not salary matching.

EXHIBIT 3.4

Who Leaves — The Tier Lens on Brain Drain

The risk profile across tiers is starkly uneven. Build-tier workers — the ML engineers, computer-vision specialists, and AI researchers closest to model creation — show the highest lifetime brain-drain rate at 17.2 %, five percentage points above the average. Enable roles (data engineers, platform builders) are markedly stickier at 9.5 %, likely because infrastructure work is tied to domestic firm context and local data architectures.



Source: Revelio Labs via WRDS · Austria average 12.5 %

KEY FINDINGS

- Build tier: 17.2 % drain rate — about 5 pp above average. Austria is losing its most strategically valuable cohort at the highest rate. Each Build departure reduces the country's capacity to create, not just apply, AI systems.
- Integrate tier: 14.0 %. These roles sit at the AI / business interface and are internationally substitutable — a data scientist applying AI to supply chains can do so in Munich as easily as in Vienna.
- Enable tier: 9.5 % — the stickiest tier. Infrastructure and platform work is structurally anchored to domestic IT architectures, regulatory systems, and organisational knowledge that does not transfer easily across borders.

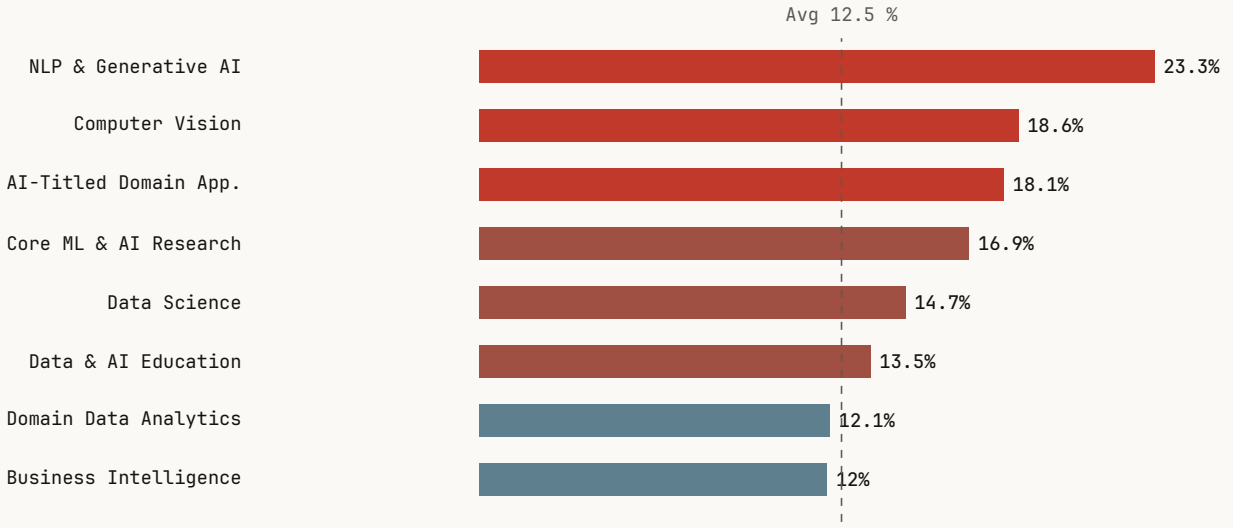
IMPLICATION

Adopt a tier-weighted retention strategy. One Build worker anchors more frontier capability than ten Adjacent analytics roles. Policy instruments should be calibrated to strategic value, not headcount volume.

EXHIBIT 3.5

Frontier Vulnerability — Subcategory Drain Rates

Subcategory detail sharpens the tier-level picture into a precise risk map. NLP & Generative AI has the highest drain rate at 23.3 %: nearly one in four practitioners leaves Austria. The base is small (about 60 professionals), but that is precisely why each loss matters strategically — Austria cannot afford to lose a quarter of an already tiny frontier.



Source: Revelio Labs via WRDS · Austria average 12.5 %

KEY FINDINGS

- NLP & Generative AI: 23.3 % drain rate — the highest of any subcategory. With only about 60 practitioners, Austria is haemorrhaging the capability most central to the current wave of commercial AI development.
- Computer Vision & Autonomous Systems (18.6 %), AI-Titled Domain Application (18.1 %), and Core ML & AI Research (16.9 %) are also well above the 12.5 % average — these are the roles closest to frontier system development and the hardest to replace domestically.
- Enterprise categories (Data Science, Business Intelligence, Domain Data Analytics) lose more people in absolute terms but at lower relative rates (12–16 %) — Austria's challenge is specialised scarcity at the frontier, not broad-based attrition.

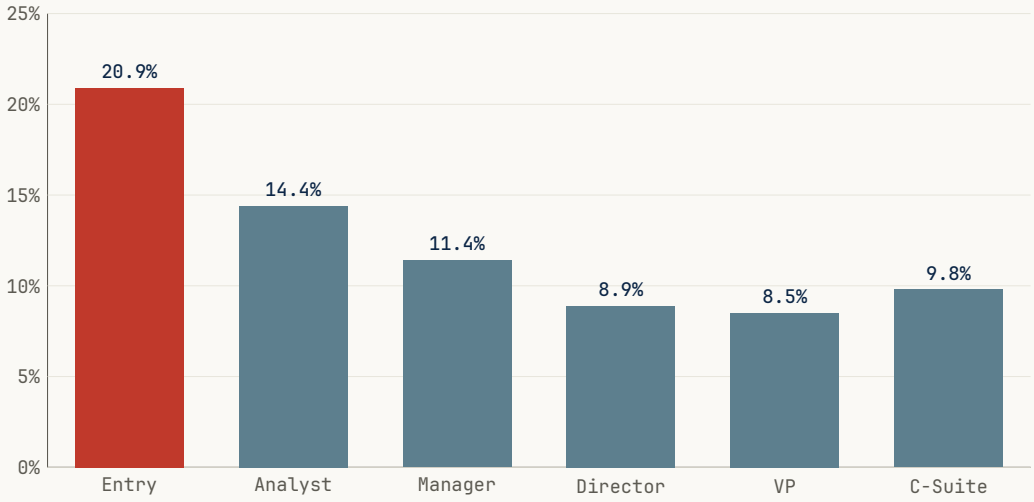
IMPLICATION

Create dedicated retention instruments for the top 3–4 frontier subcategories: competitive compute access, research sabbaticals, international collaboration grants that connect Austrian researchers to global networks without requiring permanent relocation.

EXHIBIT 3.6

The Junior Drain — Drain Rate by Seniority

Brain drain in Austria's AI workforce is not concentrated at the top — it falls steeply with seniority. Entry-level professionals leave at 20.9 %, more than 1.6× the country's 12.5 % average and 2.1× the C-suite rate (9.8 %). The narrative is clear: Austria primarily loses people before they anchor into senior local career ladders, a pre-anchoring phenomenon. Senior leadership stays — but the pipeline that should have produced tomorrow's seniors is leaking the most.



Source: Revelio Labs via WRDS · drain rate per seniority level · 6 levels (Entry → C-suite)

KEY FINDINGS

- Entry-level drain runs at 20.9 % — the highest of any seniority level and 1.6× the Austria-wide average of 12.5 %. The youngest cohort, with the fewest local commitments (housing, family, network), is the most mobile.
- Drain rate falls monotonically with seniority: Analyst 14.4 %, Manager 11.4 %, Director 8.9 %, VP 8.5 %, C-suite 9.8 %. Each step up the ladder almost halves the relative loss probability versus Entry — until the C-suite rung, where the rate ticks back up.
- Median seniority for brain drain is 2.0 (Analyst / Associate) versus 3.0 for stayers. Austria's senior leadership stays — but the junior pipeline that should have produced tomorrow's seniors is the cohort most at risk.

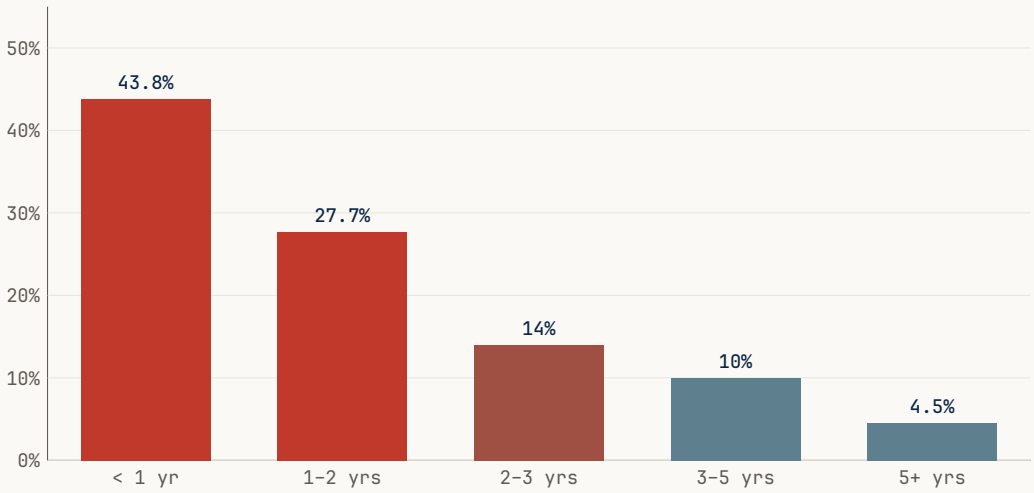
IMPLICATION

Target the 0–5 year career window with fast-track promotions, leadership development, international research rotations (that bring people back), and equity-like retention mechanisms — the Entry-to-Manager band is where every retained professional compounds into a senior anchor.

EXHIBIT 3.7

The First-Year Window — When Brain Drain Happens

Timing is the single most actionable finding. The first year after entry into an Austrian AI role is the critical risk window: 43.8 % of all brain-drain departures happen within 12 months. Build-tier workers leave fastest, with a median tenure of just 0.75 years. Only 4.5 % of brain-drain movers stay five years or more — meaning that if Austria retains someone for three years, it has almost certainly kept them permanently.



Source: Revelio Labs via WRDS · tenure between hire and observed departure abroad · 5 buckets

KEY FINDINGS

- 43.8 % of brain drain happens within the first year. The retention intervention must start on day one, not at the first performance review — by then, half the potential leavers are already gone.
- Only 4.5 % of brain-drain movers stay 5+ years before leaving. This creates a clear strategic implication: if you can retain someone past year 3, you've almost certainly kept them for good.
- Build-tier workers leave fastest (median tenure 0.75 years before departure). The first nine months are the critical retention window for Austria's most strategically valuable AI professionals.

IMPLICATION

Make retention radically front-loaded. Onboarding, mentorship, research access, project ownership, and promotion visibility should all begin in month one. The traditional 'prove yourself for two years, then we'll invest in you' model is precisely wrong for AI talent.

Method, sources, definitions.

This chapter uses Revelio Labs workforce data accessed via WRDS to follow career trajectories of AI workers observed in Austria between 2018 and 2025. Brain drain is defined as a next observed position outside Austria. Domestic churn is a next position inside Austria at a different employer. Two cautions: Revelio is not a census (it reflects professional-profile coverage), and 2025 transitions remain preliminary.

PARAMETERS

Primary segment	austria_located (17,348 trajectories)
Core AI sample	Build + Enable + Integrate (subset of 19,037 AI users)
Brain-drain definition	Next observed position outside Austria
Domestic churn	Next position inside Austria, different employer
Salary data	Machine-imputed USD · EUR at ECB annual avg rate
Cohort analysis	By year of first Austrian AI role observed
Seniority scale	1–6 (Entry → C-suite); Revelio scale 7 (Partner/Board) excluded
Destination countries	20+ tracked individually