Competitive Benchmarking

Austria's position in the European AI landscape

+361

specialists needed to match Germany

Top-10 on quality. Mid-pack on quantity. The gap is horizontal, not vertical.

#3 / 38	#19 / 38	+361	$91 K
Core share rank in Europe	Core density rank (per 1,000 emp.)	Specialists needed to match Germany	Median AI salary (#8 in Europe)

EXECUTIVE SUMMARY

Austria's European position is not one of weak capability — it is one of high workforce depth on a relatively small installed base. With 4,578 Core AI specialists, Austria ranks #14 in absolute headcount but #3 in Core share: nearly 4 in 10 AI workers are in specialised rather than adjacent roles. That combination — high quality, modest scale — is strategically encouraging, because scale can be built; technical depth is harder to create from scratch. The benchmark data point to a clear agenda: accelerate Build-tier supply, convert salary competitiveness into real attraction, spread AI demand beyond Vienna, and set quantified density targets. Austria needs roughly 361 additional Core specialists to match Germany's density, and about 2,471 to reach the Small Innovator median.

POLICY IMPLICATIONS

Accelerate Build-tier supply. Austria's Build share (11.5 %) trails Germany (13.9 %) and Switzerland (13.3 %) by 1.8–2.5 pp, which translates to roughly 270 missing Build specialists. Instruments: expanded AI master's capacity, doctoral fellowships, competitive compute access at Austrian universities, and international research-collaboration grants.

Convert salary competitiveness into real attraction. Austria pays $91 K median (#8 / 38) and 6 % more than Germany. This pricing power is under-leveraged. Instruments: Red-White-Red Card reform for AI professionals, targeted recruitment campaigns in CEE / Southern Europe, and employer branding that positions Austria's DACH-quality proposition.

Spread AI demand beyond Vienna. Vienna holds 60 % of Core AI. The 24–48 % regional salary premium is the most powerful lever for economic upgrading. Instruments: applied AI institutes in Graz and Linz, MNC partnership programs, and sector-specific AI advisory for the Mittelstand.

Set quantified density targets. Austria needs 4,939 Core specialists to match Germany (current 4,578). Set targets: 1.10 / 1,000 by 2028, 1.40 / 1,000 by 2030. Report progress annually using the benchmark methodology. Tie funding instruments to these KPIs.

SOURCE: REVELIO LABS VIA WRDS · 38 EUROPEAN COUNTRIES BENCHMARKED · 2018–2025

EXHIBIT 4.1

Austria's 2025 Core AI Scorecard

Before diving into the detailed benchmarks, a summary scorecard crystallises Austria's position across eight dimensions. The pattern is clear and consistent: Austria performs like a top-tier market on measures of workforce depth and quality (Core share #3, salary #8, seniority #7, Integrate share #4, CAGR #14) but significantly lags on measures of deployment breadth and scale (Core density #19, Build share #15, Enable share #26). This is not a country that has failed to build AI capability — it is a country that has built deep capability on too narrow a base.

METRIC	VALUE	RANK	POSITION
Core AI share	**40.8 %**	#3 / 38	
Median AI salary	**$91 K**	#8 / 38	
Mean seniority	**3.11 / 7**	#7 / 38	
Integrate share	**33.9 %**	#4 / 38	
Workforce CAGR	**11.4 %**	#14 / 38	
Core density / 1k	**0.99**	#19 / 38	
Build share	**11.5 %**	#15 / 38	
Enable share	**30.8 %**	#26 / 38	

Source: Revelio Labs via WRDS · 38 European countries benchmarked

KEY FINDINGS

- Core AI share (40.8 %, #3 / 38) is Austria's signature strength — nearly 4 in 10 AI workers are in specialised roles rather than adjacent support functions. Only Germany (42.5 %) and Switzerland (41.9 %) concentrate their AI talent more intensely.
- Core density (0.99 per 1,000 employed, #19 / 38) is the clearest gap metric. Austria sits above the European median but 29 % below the DACH average (1.40) and 37 % below the Small Innovator median (1.57).
- The scorecard's diagnostic implication is precise: Austria does not need to build quality — it already has it. It needs to build scale without diluting the quality that makes it distinctive.

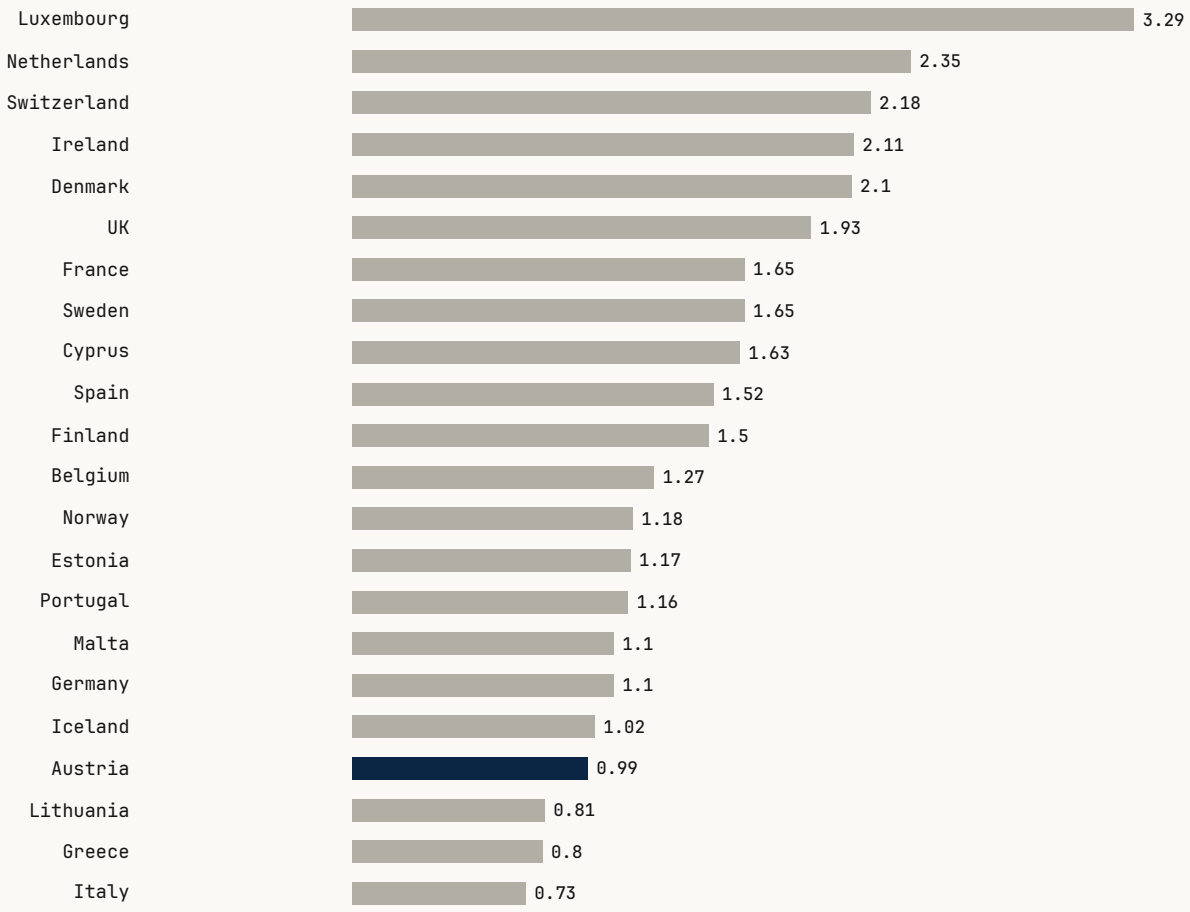
IMPLICATION

Use this scorecard as the annual monitoring framework. The two metrics that should improve most in the next policy cycle are Core density (0.99 → 1.10+) and Build share (11.6 % → 13 %+).

EXHIBIT 4.2

Core AI Density — European Ranking

Benchmarking on Core AI rather than the full AI ecosystem moves Austria from the lower half into the European middle — but against its true peer group (DACH and the Small Innovators), the density gap remains material. At 0.99 Core AI workers per 1,000 employed, Austria ranks 19th of 38 European countries. The leaders — Luxembourg, Netherlands, Switzerland, Ireland, Denmark — each deploy more than 2 Core AI workers per 1,000 employed, 2–3× Austria's current level. This is not a quality gap; it is a deployment gap.



Source: Revelio Labs via WRDS · 22 European peers shown · Eurostat employment denominators

KEY FINDINGS

- Austria at 0.99 / 1,000 sits just above the European median but meaningfully below the DACH average (1.40) — a 29 % deficit that translates to approximately 361 missing Core specialists relative to Germany alone.
- The leaders are well ahead on deployment: Luxembourg (3.29 / 1,000), the Netherlands (2.35 / 1,000), and Switzerland (2.18 / 1,000) deploy 2–3× Austria's Core AI density — illustrating what is achievable in similarly-sized advanced economies.
- Core density has risen meaningfully since 2018, but the gap to leaders has widened because they grew faster. Relative positioning matters more than absolute improvement.

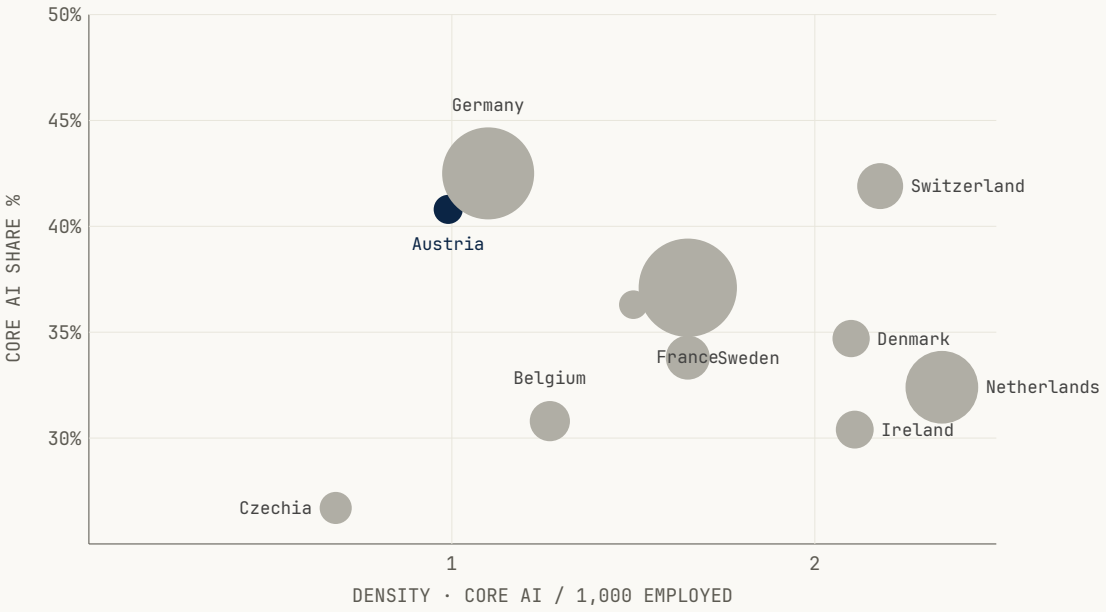
IMPLICATION

Set a concrete 2030 density target: 1.10 Core / 1,000 (matching Germany) as the minimum, with 1.57 (Small Innovator median) as the stretch goal. Current net Core flows of about +300 / year reach the minimum in roughly 3 years; the stretch goal requires doubling net additions.

EXHIBIT 4.3

Depth vs Scale — Austria's Strategic Position

The depth-scale matrix is the single most important diagnostic in this chapter. It positions each country by Core AI share (depth — y-axis) against Core AI density (scale — x-axis), with bubble size reflecting total AI workforce. Austria sits in the upper-left quadrant: high depth, lower scale. It clusters with technically serious markets like Germany and Switzerland on the depth axis, but lacks the deployment breadth of the Netherlands, Denmark, or Ireland. The desired strategic move is rightward — raising density while preserving the unusually high share of technically deep roles.



Source: Revelio Labs via WRDS · bubble area scales with total AI workforce

KEY FINDINGS

- Austria's 40.8 % Core share places it in the top 3 on the depth axis — this is not a country with inflated AI counts from adjacent roles. Its workforce is genuinely technically concentrated.
- The gap to peers is horizontal, not vertical: Austria needs to move rightward (more deployment) without moving downward (diluting depth). Expanding through Adjacent roles would be counterproductive — it must scale the Core.
- The Netherlands and Denmark demonstrate that small countries can achieve 2–3× Austria's density while maintaining respectable Core shares (32–35 %). Scale and depth are not inherently trade-offs — but Austria must manage the expansion carefully.

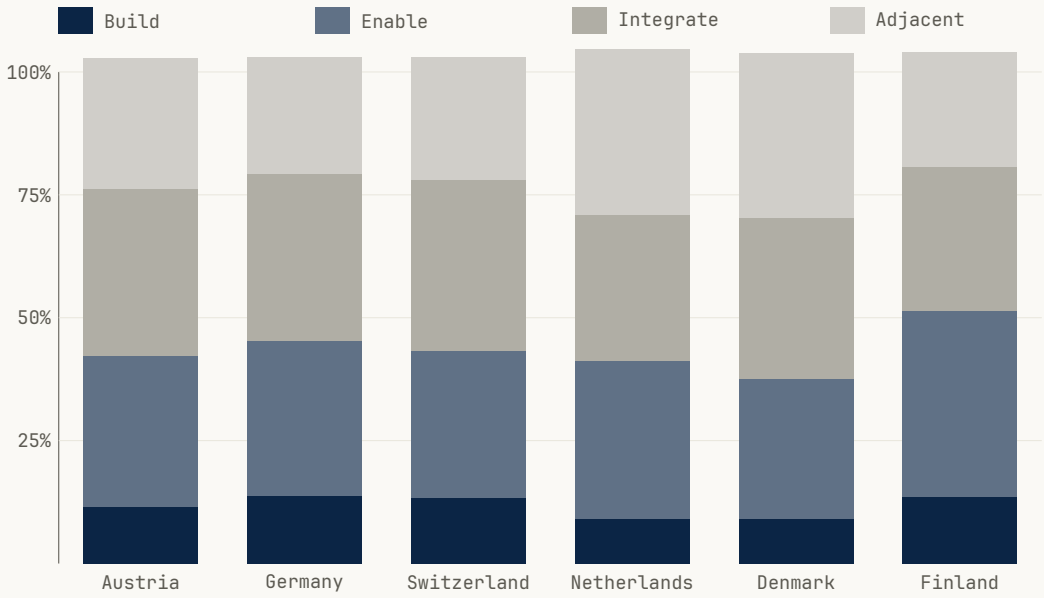
IMPLICATION

Anchor the scaling strategy in the depth-scale matrix. Every expansion initiative should be evaluated on two criteria: does it increase density, and does it preserve or improve Core share? If it only does the first, it is dilutive.

EXHIBIT 4.4

Tier Composition — Austria vs European Peers

Austria's AI ecosystem has strong Enable (30.8 %) and Integrate (33.9 %) layers, reflecting a workforce oriented toward applied enterprise adoption — data engineering, ML infrastructure, and business intelligence. The structural weakness is the Build tier (11.5 %): the layer that creates frontier models, algorithms, and deep technical IP. At 11.5 %, Austria trails Germany (13.9 %) by 2.5 pp and Switzerland (13.3 %) by 1.8 pp. In a workforce of about 10,900, that 2.5 pp gap translates to roughly 270 missing Build specialists — a deficit that is concrete, measurable, and addressable within a single policy cycle.



Source: Revelio Labs via WRDS · DACH plus 4 Small Innovators

KEY FINDINGS

- Austria is not inflating its AI counts: an Adjacent share of 26.6 % means its workforce is more technically genuine than many European peers where Adjacent roles dominate at 30–40 %.
- Enable (30.8 %) and Integrate (34.0 %) are substantial — Austria has the infrastructure and application layers needed for enterprise AI deployment. The foundation for scaling is already in place.
- Build is the binding constraint: at 11.5 % of AI jobs, Austria trails every DACH peer. Each Build worker creates disproportionate capability value — they are the designers, not just the deployers, of AI systems.

IMPLICATION

Close the Build gap with targeted supply-side instruments: expanded AI master's and doctoral capacity, competitive compute access at Austrian universities, and research fellowships that connect to international networks without requiring permanent relocation.

EXHIBIT 4.5

Peer-Group Rankings — A Consistent Pattern

A single all-Europe ranking hides the pattern that matters most. When Austria is assessed across three distinct peer groups — all 38 European countries, the three DACH members, and the eight Small Innovators (DK, FI, SE, NL, IE, BE, IL, AT) — the same diagnostic emerges regardless of comparator set. Austria performs like a top-tier market on depth and pay (Core share #1 / 8 among Small Innovators, salary #5 / 8) and on long-period workforce growth (CAGR #1 / 8), but like a laggard on present-day deployment breadth (density #8 / 8 among Small Innovators).

PEER GROUP	CORE SHARE	DENSITY	SALARY	CAGR
All 38 European	#3	#19	#8	#14
DACH (3)	#3	#3	#2	#2
Small Innovators (8)	#1	#8	#5	#1

Source: Revelio Labs via WRDS · 38-country benchmark

KEY FINDINGS

- Among Small Innovators, the contrast is starkest: Austria is #1 / 8 on Core share but #8 / 8 on Core density. It has the deepest AI workforce in its peer group but deploys it the least broadly — a precise diagnostic of the scaling challenge.
- Across all 38 countries, Austria is mixed: #3 on Core share, #8 on salary, #7 on seniority (the quality cluster), versus #19 on density, #15 on Build share, #14 on CAGR (the scale cluster). The two clusters are consistently misaligned.
- The pattern is not an artefact of peer-group selection. Whether compared to all of Europe, to DACH alone, or to the Small Innovators, Austria's strength is always depth and its weakness is always scale. This consistency makes the policy prescription unambiguous.

IMPLICATION

Report against all three peer groups annually. The Small Innovator comparison is the most actionable because these countries face similar constraints (small populations, open economies, high education levels) and yet achieve 2–3× Austria's deployment intensity.

EXHIBIT 4.6

Scaling Roadmap — Concrete Targets

Austria does not need a generic ambition statement. It needs a quantified scaling path. Using Austria's 2025 employment base and current Core AI stock, the benchmark gaps translate directly into target headcounts and approximate timelines. Matching Germany's density requires about 4,939 Core specialists (+361 from today) — achievable in roughly 1 year at recent net-addition rates of about 300 / year. Reaching the Small Innovator median requires about 7,049 (+2,471) — closer to 8 years at current rates, or 4 years if net additions can be doubled.

TODAY (2025)	MATCH GERMANY	DACH AVERAGE	INNOVATOR MEDIAN
4578	4939	6286	7049
0.99 / 1,000	1.1 / 1,000	1.4 / 1,000	1.57 / 1,000

Source: Revelio Labs via WRDS · current density 0.99 / 1,000

KEY FINDINGS

- Germany is within reach: +361 Core specialists to match Germany's density (1.10 / 1,000). At recent net Core flows of about +300 per year, this is approximately one year — meaningful but not daunting.
- The DACH average requires +1,708 to reach 6,286 Core specialists — roughly 6 years at current rates, or 3 years if net additions rise to about 550 / year through stronger retention and pipeline expansion.
- Timing depends as much on retention as on inflow. Every additional departure prevented is worth as much as a new graduate recruited. The cheapest way to close the gap is to stop the leak while expanding the pipe.

IMPLICATION

Anchor the next policy cycle in concrete density targets: 1.10 / 1,000 by 2028 (match Germany), 1.40 / 1,000 by 2030 (match DACH average). Fund instruments against these targets, and report progress annually using the Revelio / Eurostat benchmark methodology.

EXHIBIT 4.7

Scale Without Dilution — A Four-Package Policy Agenda

The chapter's benchmark result converges on a single strategic message: Austria already has the quality foundation to compete at the European frontier, but it has not yet converted that into peer-level deployment density. The closing exhibit translates the benchmark findings into four policy packages, each addressing a specific gap identified in the data. Together, they form an integrated agenda for scaling Austria's Core AI base without diluting the depth advantage that makes it distinctive.

01 Build pipeline

Close the Build-share gap (11.5 % → 13.5 %) through expanded AI master's capacity, doctoral fellowships, and competitive compute access. Austria trails Germany by 270 Build specialists — a concrete, addressable deficit.

02 Talent attraction

Convert salary competitiveness into real inflows. Reform the Red-White-Red Card for AI professionals, launch targeted recruitment in CEE / Southern Europe, and position Austria's DACH-quality proposition aggressively.

03 Regional diffusion

Spread AI demand beyond Vienna through applied AI institutes in Graz and Linz, MNC partnership programs, and sector-specific advisory for the Mittelstand. The 24–48 % salary premium is the most powerful regional upgrading lever.

04 Quantified density targets

Tie funding instruments to annual Core AI density benchmarks: 1.10 / 1,000 by 2028 (match Germany), 1.40 / 1,000 by 2030 (match DACH average). Report progress annually using the Revelio / Eurostat methodology.

Source: synthesis of Ch04 benchmark findings

KEY FINDINGS

- Package 1 — Build pipeline: close the Build-share gap (11.5 % → 13.5 %) through expanded AI master's and doctoral capacity, competitive compute access, and research fellowships. Austria trails Germany by 270 Build specialists — a concrete, addressable deficit.
- Package 2 — Talent attraction: convert salary competitiveness into real inflows by reforming the Red-White-Red Card, launching targeted recruitment in CEE and Southern Europe, and positioning Austria's DACH-quality + better-pay proposition aggressively.
- Package 3 — Regional diffusion: spread AI demand beyond Vienna through applied AI institutes in Graz and Linz, MNC partnership programs, and sector-specific advisory for the Mittelstand. The 24–48 % salary premium is the most powerful regional upgrading lever available.

IMPLICATION

Set quantified density targets (Package 4): tie funding instruments to annual Core AI density benchmarks. If Austria reaches 1.10 / 1,000 by 2028 and 1.40 / 1,000 by 2030, it will have closed the gap to Germany and positioned itself as a genuine Small Innovator AI leader.

Method, sources, peer groups.

This chapter benchmarks Austria against 38 European countries using the Chapter V benchmark panel from Revelio Labs via WRDS. Austria's headline baseline is synchronised to the final Chapter I figures (4,578 Core AI specialists, austria_located segment) so that both chapters converge on the same 2025 starting point. Density metrics use Eurostat official employment denominators to ensure cross-country comparability. Salaries are machine-imputed USD. Coverage varies by country (Austria: 22.5 %, due to XING prevalence in DACH).

PARAMETERS

Countries benchmarked	38 European (EU-27 + EEA + UK + selected)
Primary metric	Core AI · Build + Enable + Integrate · ~120 roles
Density denominator	Eurostat official employment (2024 latest)
Salary metric	Median AI salary · machine-imputed USD
Austria Core AI (2025)	4,578 specialists · synchronised to Ch.1
Austria AI workforce	11,228 · Full AI (austria_located)
Core share	40.8 % · #3 / 38 in Europe
Core density	0.99 per 1,000 employed · #19 / 38
Peer groups	DACH (3) · Small Innovators (8) · CEE · Western Europe
Time series	2018–2025 · 2025 preliminary