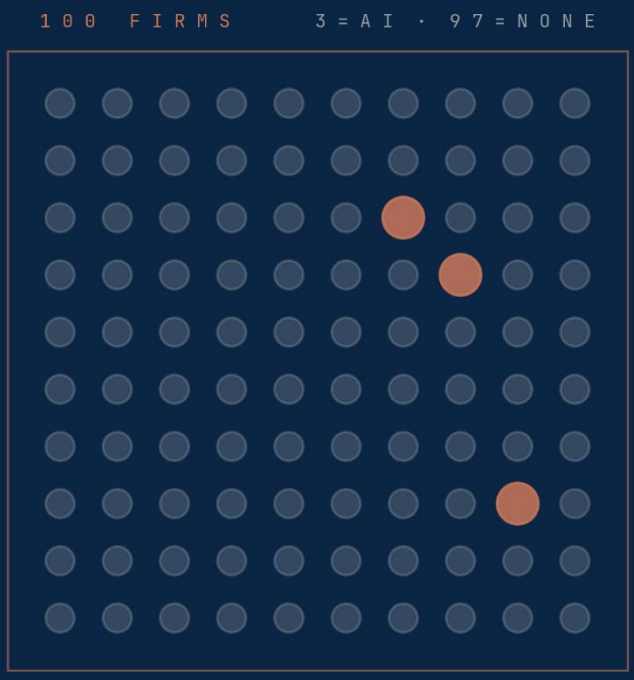

97%

of Austrian firms employ zero AI workers.

Austria's AI Workforce.

We measure what really matters.

The variable that decides whether AI translates into productivity inside firms is not capital, compute, or regulation — it is the workforce that builds, deploys, and operates it. This is the most detailed workforce read of the Austrian AI economy ever published.

WITH CONTRIBUTIONS FROM

OMV · Infineon AG · Magna · VTU Group · Müller-Transporte GmbH · Saubermacher AG

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ISBN 978-3-200-11327-5

SCOPE

2.86M records · 1.23M workers · 123,226 firms

2018–2025 · Revelio Labs via WRDS

AUTHORS · WU WIEN & VTU GROUP

Three authors. One research program.

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AUTHOR

SCOPE OF ANALYSIS

2.86 M employment records · 1.23 M unique workers · 123,226 Austrian firms · 2018–2025 · 37 European peers · Revelio Labs via Wharton Research Data Services (WRDS).

REPORT CONTRIBUTORS FROM THE FIELD

How Practitioners read our Data *and apply new Insights to their Companies.*

Six practitioners across Austrian industry, from large industrial groups (OMV, Infineon, Magna) to Mittelstand (VTU, Müller-Transporte, Saubermacher), read and validated our findings. We start with the large industrial groups.

CONTRIBUTOR

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"AI capability will flourish where business ownership, data readiness, and workforce strategy meet. That is the leadership agenda on top of the technology agenda."

CONTRIBUTOR

Daniel Valtiner

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"AI is no longer a future scenario. It is already reshaping the global economy at systemic scale. Austria now has to accelerate execution: build future-oriented capabilities, enable industrial adoption at scale, and shape the conditions in which new ideas, ventures and opportunities can emerge and grow."

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"AI does not create value through models, but through disciplined integration into production, processes, and the organization. Competitive advantage comes from measurable business impact at scale — driven by both technology and people."

CONTINUED →

REPORT CONTRIBUTORS · CONTINUED

From the Austrian Mittelstand.

The Mittelstand carries the bulk of Austria's employment. Three executives across engineering services, logistics, and circular-economy services on what they are seeing in their own firms.

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"AI workforce is becoming a strategic asset class. Firms that understand AI-driven career architecture and organizational structures will lead and win the AI race."

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"The SME segment is the decisive battleground. Small increases in AI capability there can shift national productivity faster than another broad awareness campaign."

Willibald Erhart

Chief Digital Officer · Saubermacher AG

CONTRIBUTOR

"The firms that pull AI from business problems will outperform those pushing technology into search of relevance. Every initiative needs a workflow, a KPI, and an owner."

C O N T E N T

What this report covers, and where to find it.

What this means for your firm — and the moves that cannot wait.

Austria has built one of Europe's most technically deep AI workforces — and is now running out of time to translate that depth into national productivity.

The composition is right. Austria ranks among Europe's top three on the share of its AI workforce concentrated in the specialised roles that build, enable, and integrate AI.

The scale is not. Density — specialists relative to the workforce — is mid-pack, well below the DACH average and a fraction of the small-country leaders. Annual growth halved in a single year. The frontier is leaking abroad, with the sharpest losses precisely in the generative-AI specialties that define the current commercial wave. Women hold fewer than one in five frontier roles. The entry-level pipeline is a fraction of the non-AI norm — a workforce that is maturing without replacement.

The strategic consequence is direct. External hiring alone cannot close the gap; supply is too thin. The dominant mechanism for the next five years is internal conversion — upgrading the BI specialists, ERP owners, data analysts, automation engineers, and software developers who already sit one step away from AI work. The companies that build this conversion layer in 2026 will compound an advantage their peers cannot close. The policy task is to make the same shift at the national level — funding demand and reskilling, not only supply and research — and to anchor it in measurable density targets.

This report translates that argument into concrete moves for firms of every size, for AI leaders, and for Austrian policy through 2030.

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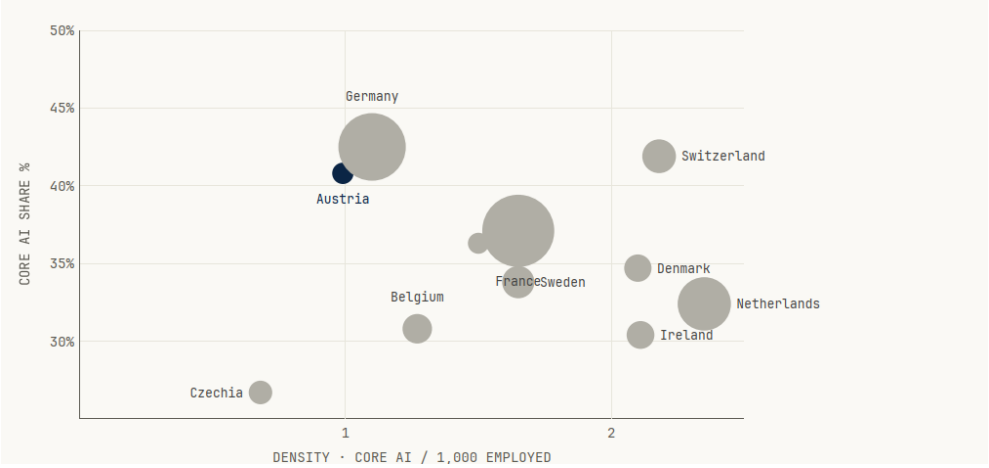


Source: Revelio Labs via WRDS · Core AI share × density · 38 European peers · Austria highlighted

Five takeaways for decision-makers.

01

DEMAND

The 97 % is not only a talent-supply problem.

Most firms cannot yet articulate the business case for AI hiring. Diffusion is blocked at the **business-case layer, not only the talent layer**.

02

SEGMENTATION

Company size determines the playbook.

Micro firms (<10) need tools, not hires. SMEs need one champion and external partners. **Mid-sized firms need an internal translation layer. Only large firms need Build-tier specialists.**

03

CONVERSION

Conversion beats hiring.

BI specialists, ERP / CRM owners, data analysts, automation engineers, and software developers **already sit close to AI**. **Upgrading existing staff is faster and cheaper than competing in the international AI hiring market.**

04

RETENTION

Retention is a project problem, not only a pay problem.

44 % of brain-drain departures happen within twelve months. Median tenure for Build-tier leavers is **nine months**. **Project pipeline matters before salary review.**

05

FRONTIER

Build is the frontier asset and the scarcest cohort.

~1,300 specialists nationally, **19 % female**, **17 % drain rate**. Every Build retention or recruitment matters **disproportionately to Austria's frontier capability**.

CHAPTER 01

01

The Stakes.

Why workforce is the question that matters.

AI is the decade's defining general-purpose technology.

But **the variable that decides whether it translates into productivity inside firms is not capital, compute, or regulation: it is the workforce that builds, deploys, and operates it.** The technology itself is now broadly available, through APIs, foundation models, and cloud compute that any firm can rent. What separates the firms that turn that availability into output from those that do not is **the talent that can design, integrate, and run AI in production**. That talent is also the **most expensively contested input** in the AI economy. Across the OECD, AI specialists command a substantial wage premium over comparable non-AI workers (Alekseeva et al. 2021), and the international war for AI talent has measurably raised hiring costs in every advanced economy that tracks it. **The firms that hire, retain, and renew AI workforce ahead of their peers compound an advantage that the others cannot easily close.**

Understanding this workforce is therefore central to the competitiveness of the Austrian economy, because **what matters for the firm matters for the economy built on it**. And the AI workforce is **not an ordinary labour category**. It is **small, scarce, internationally mobile, and concentrated in a handful of firms and regions**, which means small changes in who hires, who retains, and who attracts talent compound into large differences in national capability over a short window. Without a granular read on this category, neither firms nor policymakers can answer the questions that determine the next decade of productivity: whether Austria is building enough AI talent to keep pace with peers, whether seniority is renewing or ageing out, whether women are present at scale, whether the frontier stays in the country or migrates abroad, and whether AI capability is forming in Vienna alone or diffusing across regions.

This report closes the gap. We read Austria's AI workforce at the individual-worker level across **2.86 million employment records, 1.23 million workers, and 123,226 firms** — the **most detailed workforce read of the Austrian AI economy ever published**, benchmarked against 37 European peers on identical definitions. The resolution matters as much as the scale: a **role-level taxonomy separates Build, Integrate, and Enable work** rather than collapsing AI activity into a single headcount, so we can read whether Austria is positioned to invent AI, integrate it into existing products and processes, or only operate what others build — and how those three layers are distributed across regions, firm sizes, and sectors. The lens is the one we have validated in three peer-reviewed studies on the same data spine: Schumacher et al. (2026a) on firm value, Schumacher et al. (2026b) on digital innovation, and Schumacher et al. (2026c) on worker-level career adaptation under generative-AI exposure.

References cited on p.2: Alekseeva et al. 2021 (AI wage premium); Schumacher et al. 2026a (ICIS, Build–Apply–Govern); Schumacher et al. 2026b (ICIS, AI Workforce Architecture); Schumacher et al. 2026c (ICIS, Career Adaptation).

CHAPTER 02

02

The Six Findings.

Austria's AI workforce in six numbers.

Six findings. Each is sharp on its own. Together they form a single argument: **Austria's depth is real, its scale gap is mechanical, and the window in which to close it is now.**

01 FINDING

THE STRENGTH

4,578

Core AI specialists, 2025. Workforce tripled since 2018; #3 of 38 in Europe on depth.

02 FINDING

THE SMALL BASE

#19/38

Core AI density rank. Top-3 on quality but a deployment gap of ~361 specialists vs Germany alone.

03 FINDING

THE SLOWDOWN

+7.1 %

YoY growth in 2025 — half of 2024. Sharpest single-year reversal in eight years of data.

04 FINDING

THE FRONTIER LEAKS

17.2 %

Build-tier brain-drain rate. 23 % in NLP / GenAI. 44 % of departures happen within the first twelve months.

05 FINDING

THE GENDER GAP

19 %

Female share of the Build tier. Lowest at the frontier. 50 years to parity at current pace.

06 FINDING

THE PIPELINE

6 %

Entry-level share of AI workforce — vs 23 % in non-AI. Conversion from adjacent roles drives growth.

4,578

+186 % since 2018

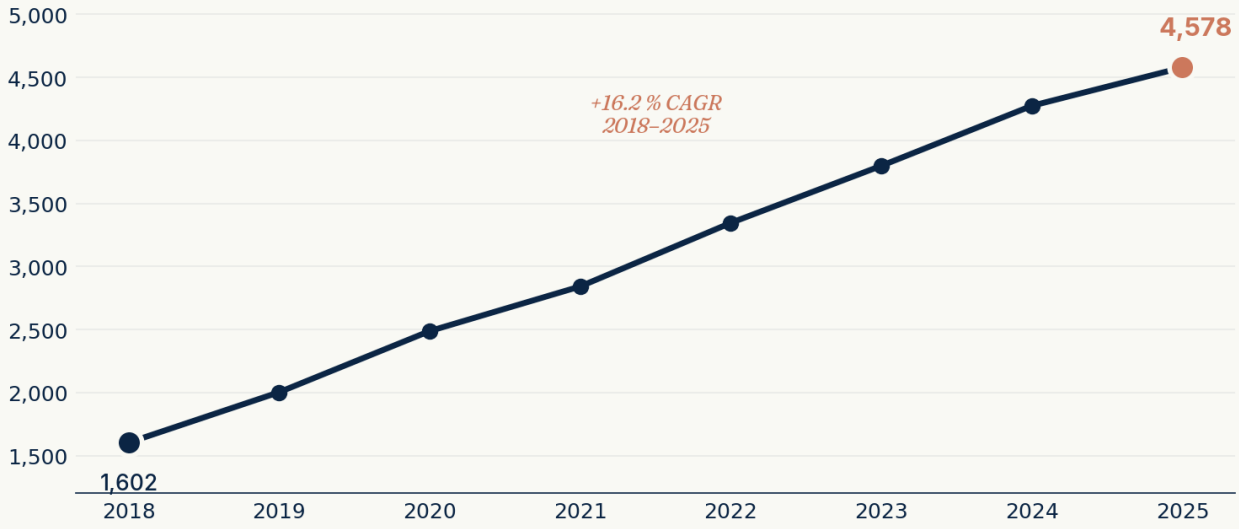
THE STRENGTH

Core AI specialists in Austria, 2025.

Workforce tripled in seven years. Austria ranks #3 of 38 European peers on Core AI share, matching Germany and Switzerland on depth.

FINDING 01 · THE STRENGTH

Core AI workforce nearly tripled, 2018 to 2025



Source: Revelio Labs via WRDS · austria_located segment · 2018–2025

Source: Revelio Labs via WRDS · austria_located segment · 2018–2025

KEY FINDINGS

- Core AI grew from 1,602 (2018) to 4,578 (2025) — a 16.2 % CAGR. Full AI workforce reached 11,228 (CAGR 11.4 %). Core grew faster than Full — Austria's workforce is becoming more technically concentrated, not just bigger.

• IMPLICATION

On Austrian firms can recruit from a genuinely capable domestic talent pool — for the next 18 to 24 months. The window is shorter than it appears: at +7.1 % growth, the pool grows by only ~300 specialists per year. Firms that begin AI workforce planning in 2026 will compete against firms that began in 2023 for the same scarce specialists and available pool.

THE SMALL BASE
FINDING 2 · OF 6

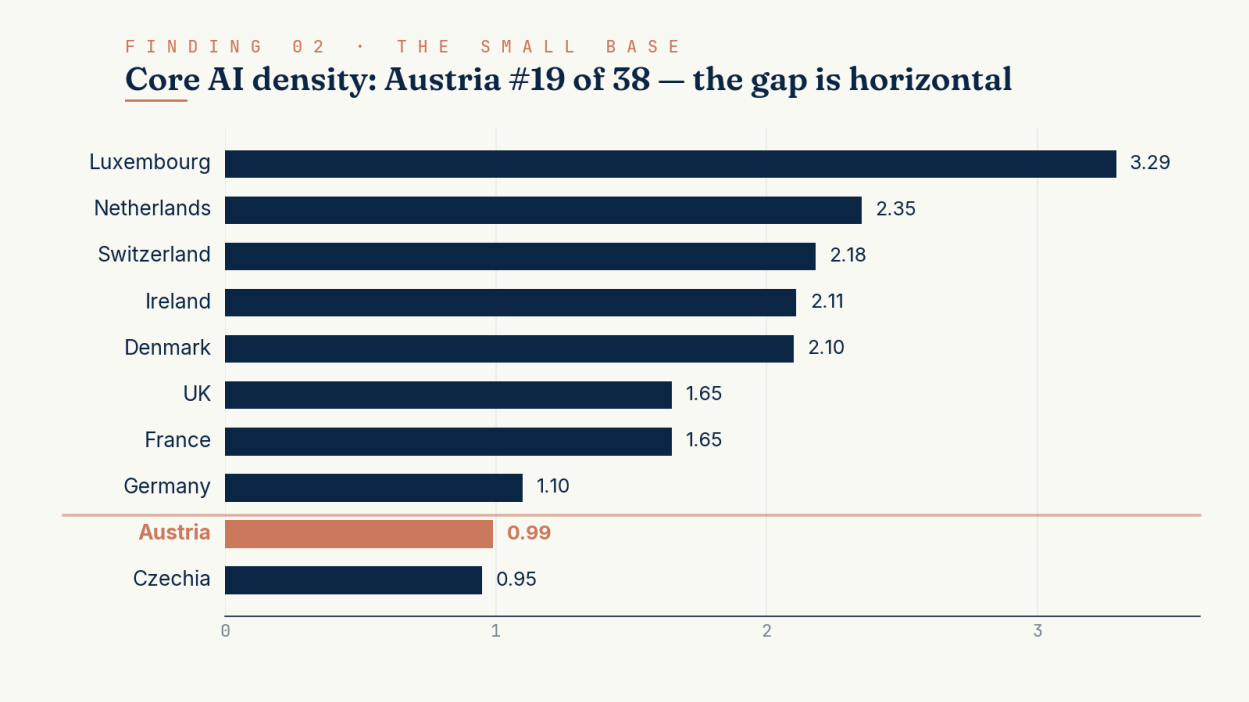
#19/38

0.99 per 1,000 employed

THE SMALL BASE

Austria's rank on Core AI density.

Top-3 on quality, mid-pack on quantity. The gap to leaders is horizontal — Switzerland and the Netherlands deploy 2–3× Austria's density.



Source: Revelio Labs via WRDS · Core AI per 1,000 employed · top-10 European peers shown

KEY FINDINGS

- Austria at 0.99 / 1,000 sits below the DACH average (1.40) — a 29 % deficit, or roughly 361 missing Core specialists relative to Germany alone. The leaders deploy 2–3× Austria's density. This is not a quality gap — Austria's Core share matches Switzerland and Germany. It is a deployment gap.

IMPLICATION

The gap is horizontal, not vertical. Austria does not need to build more quality. It needs to deploy what it already has more broadly. For firms: Austria's density deficit is, mechanically, a future-growth deficit — concentrated in the ~3,200 firms with any AI staff, who compound their advantage over time. For policy: set a quantified 2030 target — 1.10 / 1,000 by 2028 (match Germany), 1.40 / 1,000 by 2030 (DACH average).

THE SLOWDOWN
FINDING 3 · OF 6

+7.1 %

down from +12.5 % in 2024

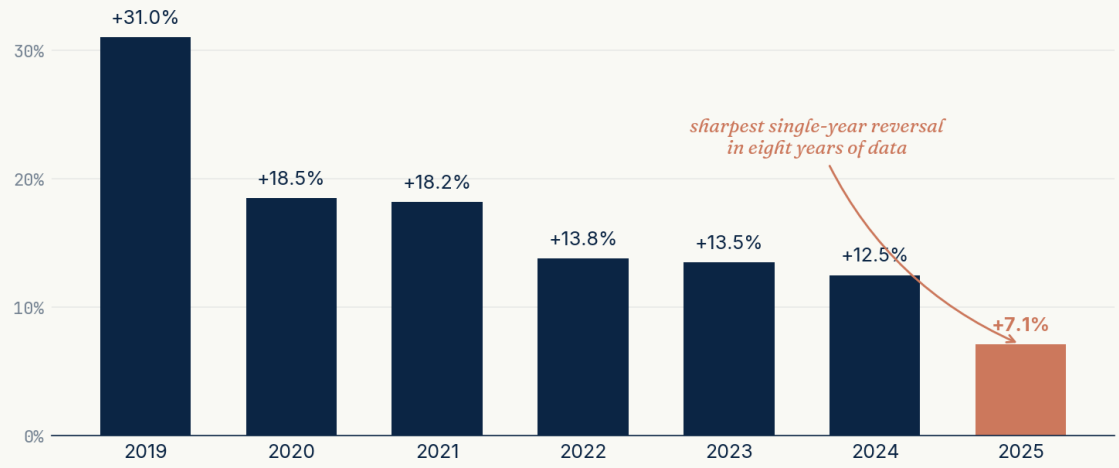
THE SLOWDOWN

Core AI year-over-year growth, 2025.

The sharpest single-year reversal in eight years of data. Net additions fell from +476 to +304 — doubling from here now takes a decade.

FINDING 03 · THE SLOWDOWN

Core AI YoY growth fell from +12.5 % to +7.1 % in a single year



Source: Revelio Labs via WRDS · 2025 figure preliminary · net additions: +304 (2024: +476)

KEY FINDINGS

- Core YoY peaked at +31.0 % in 2019 and decelerated to +7.1 % in 2025. The 2024 to 2025 fall (12.5 → 7.1) is the largest single-year reversal observed. Net additions collapsed from +476 (2024) to +304 (2025). • Long-period CAGR remains above the European median (Core 16.2 %, Full 11.4 %), but the slope is now flatter than every comparable European market we benchmark against.

• IMPLICATION

At +304 net Core additions per year, hiring-led AI capability building is no longer a viable single-path strategy for Austrian firms. Internal conversion — moving existing adjacent staff into AI work — must become the primary mechanism, with external hiring as supplementary. Half of every firm's AI workforce in 2030 will have come from inside the firm in 2025.

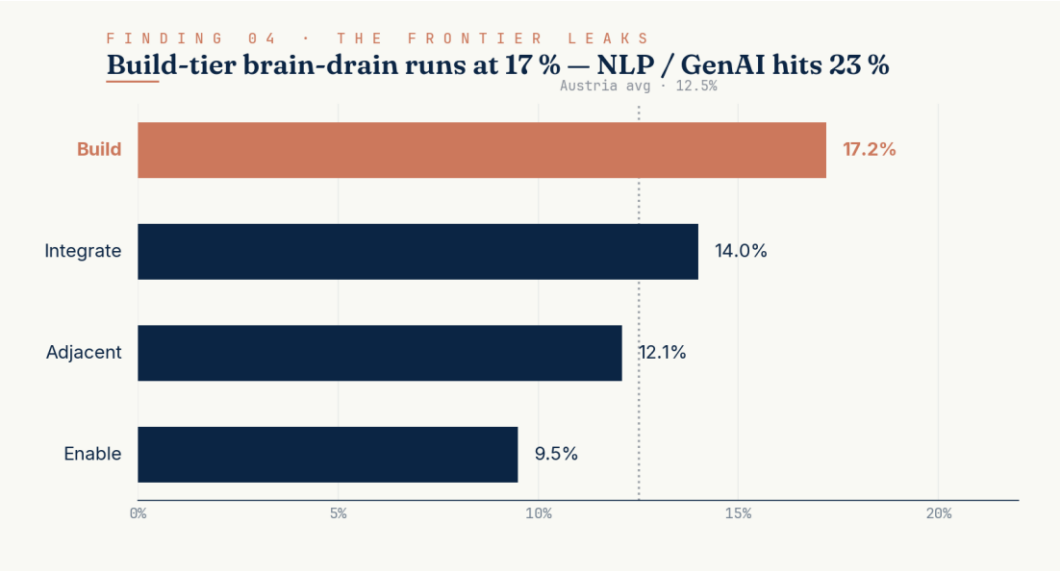
17.2 %

23 % in NLP / GenAI

THE FRONTIER LEAKS

Lifetime brain-drain rate for Build-tier specialists.

Austria keeps 82 % of AI careers — but the leak concentrates at the frontier. 44 % of departures happen within the first twelve months.



Source: Revelio Labs via WRDS · lifetime drain rate · next employment outside Austria

KEY FINDINGS

- Build-tier workers — ML engineers, AI researchers, computer-vision specialists — leave at 17.2 % over their career. NLP & Generative AI reaches 23.3 %, the highest of any subcategory. 44 % of all brain-drain departures happen within the first 12 months. Median tenure for Build-tier leavers is 0.75 years. If a firm retains a Build hire past year 3, it has almost certainly kept them. The international wage premium is the structural pull: Switzerland +39 %, USA +46 % median salary uplift.

IMPLICATION

If your firm hires a Build-tier specialist, the probabilistic expectation is that they leave within twelve months. Retention must start on day one — onboarding, project ownership, mentorship, promotion visibility — not at the first annual review. Firms that hire without these foundations effectively pay recruitment costs to train specialists who deliver value to other companies, abroad.

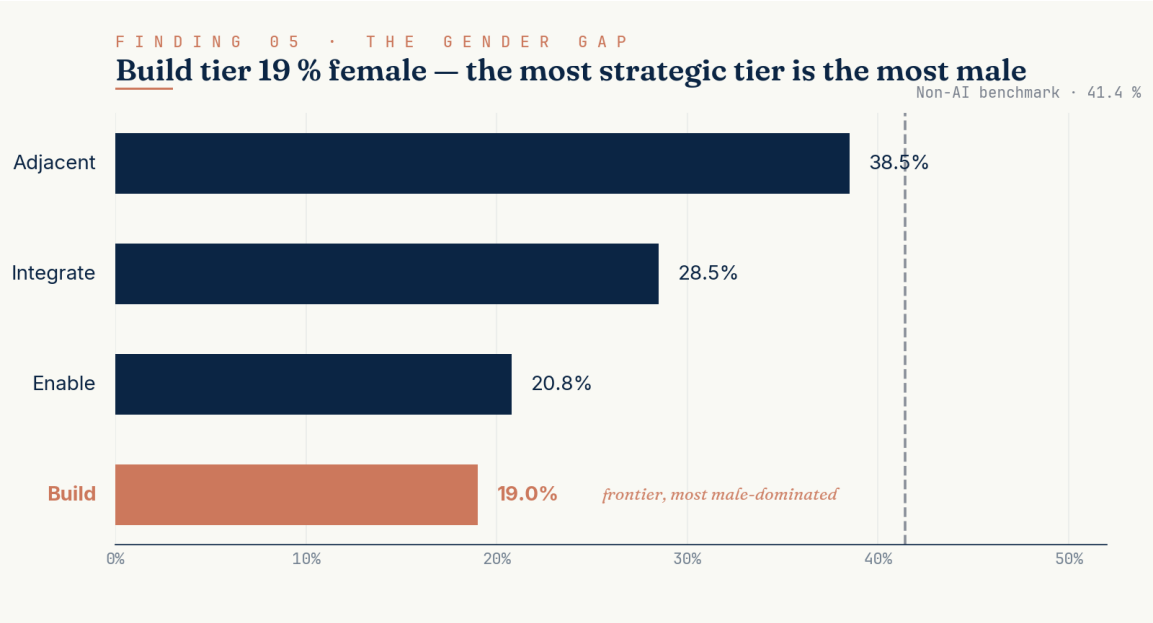
19 %

vs 41 % non-AI benchmark

THE GENDER GAP

Female share of the Build tier — the most strategic and most male.

A 15-point participation gap dwarfs the 7 % AI pay gap. At +0.30 pp per year improvement, parity is 50 years away.



Source: Revelio Labs via WRDS · lifetime female share · machine-predicted gender (~95 % accuracy)

KEY FINDINGS

- Build tier 19.0 % female — less than half the non-AI benchmark. The gap deepens with technical depth: Adjacent 38.5 %, Integrate 28.5 %, Enable 20.8 %, Build 19.0 %. Routing women into softer roles entrenches the gap. At +0.30 pp per year, parity takes ~50 years. Today's primary-school children will reach mid-career before parity arrives organically.

IMPLICATION

The gender gap is a capacity problem before it is an equity problem. Austria draws Build-tier specialists from barely half its potential pool — the total addressable supply is too small to scale national AI capability without broader participation. The intervention point is the technical pipeline (fellowships, sponsored research, return-to-work pathways), not the integration tier.

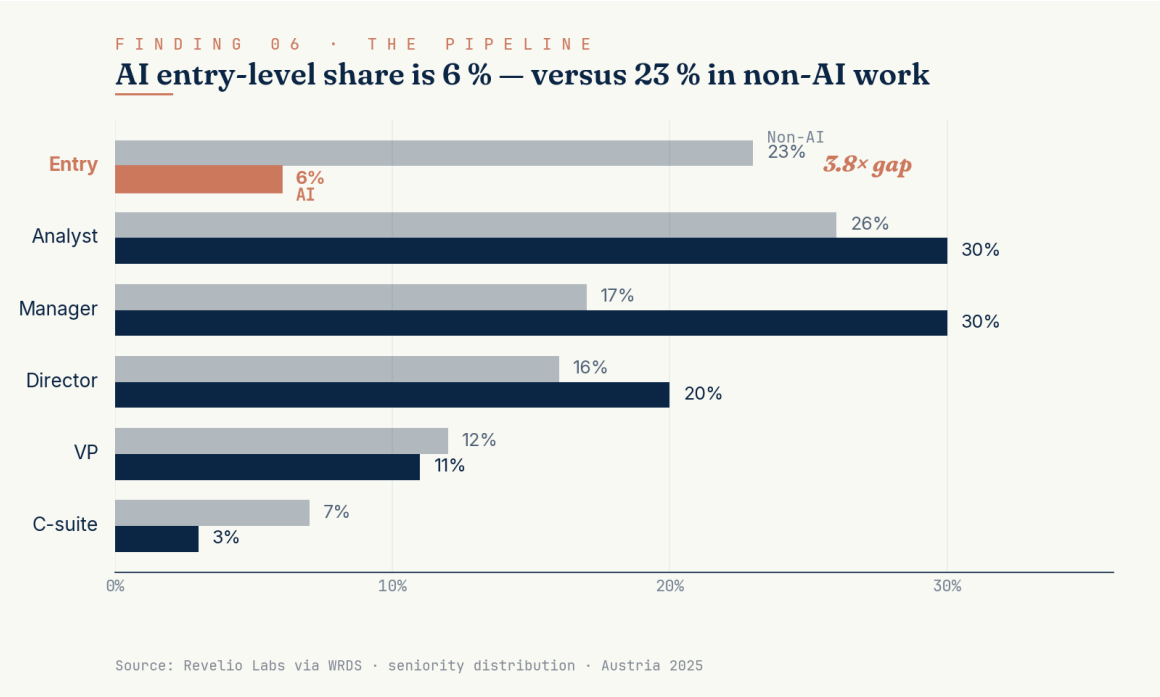
6 %

vs 23 % in non-AI

THE PIPELINE

Entry-level share of the Core AI workforce.

A 3.8× gap. 60 % of AI workers sit at Analyst or Manager level — a mid-career professional class, not a graduate cohort.



Source: Revelio Labs via WRDS · seniority distribution · Austria 2025

KEY FINDINGS

- AI entry-level share is 6 % vs 22.7 % in non-AI — a 3.8× gap. Mean AI seniority is 3.11 / 7 versus 2.85 for non-AI; AI workers are systematically more experienced. The mid-career bulge — 60 % Analyst + Manager — is the signature of a conversion economy. Most AI professionals did not start in AI; they transitioned from adjacent technical roles.

IMPLICATION

The conversion path is not optional — it is the dominant growth mechanism. Companies that wait for AI-ready graduates at scale will wait at least a decade. Companies that build internal conversion pathways from adjacent roles will compound capability faster than the external market can. Most of your firm's AI workforce in 2030 already works at your firm in 2025.

CHAPTER 03

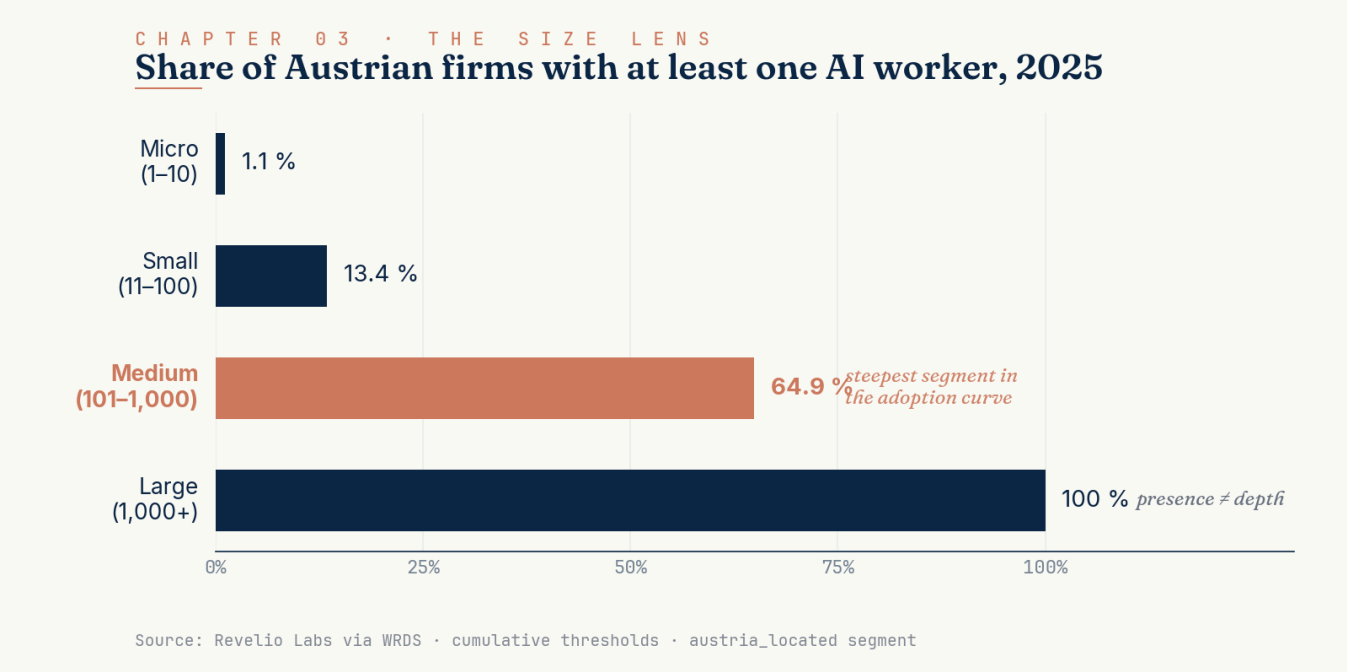
03

Recommendations by firm size.

Why adoption models differ by company size.

The 97 % headline collapses very different realities into one number.

A one-person consultancy and a 5,000-person industrial group both sit in the 97 %. The right AI strategy is not the same across the size spectrum. The chart below explains why.



Three observations to retain

- **Micro firms are not the diffusion problem.** A one-person company never needed an internal ERP team and does not need an internal AI team. This segment will adopt AI through **external tools, not internal hiring**.
- **100 % adoption at 1,000+ is misleading.** Large firms employ at least one AI worker, but **Core AI density inside those firms varies sharply**. Several large Austrian firms under-resource Build and Enable. Presence at scale does not automatically translate into competitive AI capability.
- **The SME segment (11–250) is the most movable — and the most exposed.** Adoption rises steeply from **13 % to 65 % between Small and Medium**. This is where **targeted intervention has the highest marginal return**.

Recommendations by firm size.

MICRO
1–10 EMPLOYEES

1.1 %

Consume, do not hire.

D O

- **Adopt 2–3 standard tools** — LLM, document, vertical workflow
- **Cap spend at €100–200** per employee per month
- **Two days per quarter** on structured upskilling
- **Use AI broadly** for docs, comms, marketing, research

D O N O T

Hire a dedicated AI specialist — too little project surface, leads to the 44 % first-year drain pattern.

SMALL
11–100 EMPLOYEES

13.4 %

One champion. Buy capability through partners.

D O

- **Identify one AI champion** at 4–8 hours per week
- **Invest €3,000–8,000** in their upskilling
- **Five-use-case backlog**, two 90-day pilots
- **Access Build via partners** — universities, vendors, not internal hire

D O N O T

Buy €30,000+ external consulting projects in place of structured internal capability building.

MEDIUM
101–1,000 EMPLOYEES

64.9 %

Build the translation layer.

D O

- **Convert 5–10 adjacent staff** (BI, ERP, automation, software)
- **Formal AI roadmap** with budget, training, advancement
- **Quarterly use-case portfolio** with named business owners
- **Projects in month 1** for every new AI hire

D O N O T

Squeeze AI into the legacy IT bands — €70–110K compensation is the clearing price, not optional.

LARGE
1,000+ EMPLOYEES

100 %

Protect Build. Fix the seniority pyramid.

D O

- **Protect Build specialists** as scarce strategic assets
- **Dual-track compensation** — senior technical above C-suite parity
- **Women-into-Build pathways** — fellowships, sponsored research, returnships
- **Activate the conversion layer** formally, even at

D O N O T

Expand headcount via shallow Adjacent hires — it dilutes the Core share that makes Austria #3 in Europe.

Micro firms · 1–10 employees

Consume, do not hire.

- **Adopt 2–3 standard AI tools** — LLM assistant, document / translation, vertical workflow. Monthly cost cap **EUR 100–200 per employee**.
- **Two days per quarter on structured upskilling** — internal time-boxed learning, **not external consulting**.
- **Use AI for documentation, customer communication, marketing copy, research, and bookkeeping** support. Time savings visible **within weeks**.
- **Do not hire a dedicated AI specialist.** Cost cannot be justified at this scale, and the role will not have enough internal project surface — leading directly to the **44 % first-year departure pattern**.

Small firms · 11–100 employees

Identify one AI champion. Buy capability through partners.

- **Identify one motivated employee** — typically the most digitally fluent IT, BI, or operations person — and allocate **4–8 hours per week** to AI adoption.
- **Invest EUR 3,000–8,000 in their upskilling** (focused certifications, applied AI training, short workshops) — rather than **EUR 30,000+ on an external consulting project**.
- **Build a five-use-case backlog** with named business owners. Run **two 90-day pilots**. Measure outcomes against pre-pilot baselines. **Scale what works; stop what does not.**
- **Access Build-tier capability through partnerships** — universities of applied sciences, regional AI competence centres, vendors, and multinational anchor firms — **rather than internal hiring**.
- **Use the salary-premium argument internally**: AI roles command a **24–48 % premium** over non-AI in every Austrian region; the international premium is **+39 % to Switzerland** and **+46 % to the USA**. An upskilled internal staffer gains real earning potential, which strengthens retention. **Frame upskilling as a benefit, not an imposition.**

Medium firms · 101–1,000 employees

Build the AI translation layer.

Medium firms have what micro and small firms lack: **an existing adjacent talent base**. The fastest move is to **convert that base into an AI translation layer** that connects business problems to AI solutions. **This is the segment where the report's findings translate most directly into a 12-month roadmap.**

Five steps for the next 12 months

- **Identify 5–10 employees from adjacent areas**: BI and Power BI specialists, ERP / CRM owners, software developers, automation engineers, data analysts, digitalisation team members. These are your **Integrate and Enable candidates** which you develop into core AI workers.
- **Commit to a budget and create a formal AI adoption roadmap** — training, time allocation, and **explicit career advancement**. Consider implementing an AI competence centre to ease understanding of the AI unit within your company. Without recognition as an AI unit, this becomes side-work; **with recognition, it becomes a career path** and a company area to turn towards for AI.
- **Initiate a quarterly use-case portfolio.** Score on business value, feasibility, data readiness, owner clarity, and measurement logic. **No use case enters the portfolio without a named business owner.** Do not overload — **2–3 major and 5–7 small projects** are more than sufficient and executable.
- **Install the AI competence centre as a fully operational unit** — not a project task force or one-time investment. The AI team will integrate naturally into your operational excellence and digital solutions / IT areas and become a **core unit** of your company.
- **If you hire externally, address the first-year retention risk directly**: **44 % of brain-drain departures happen in months 0–12**. Give new AI hires **real project ownership in month one**. The 'prove yourself for two years' model is precisely the **wrong design for AI workers**.
- **Plan for compensation**: AI specialists at this tier — even with less seniority — require **EUR 70,000–110,000**. Salary bands designed for traditional IT will not retain them. Treat compensation as **investment, not cost-class assignment**. Alekseeva et al. (2021) document the wage premium in US data; we observe **24–48 % in Austria** — the market clears at a premium whether your firm pays it or not.

Why this segment matters most

SMEs (11–250) move from **13 % to 65 % adoption between Small and Medium — the steepest segment in the adoption curve**. **The companies that move now define their competitive position for the next decade.** The companies that wait will not catch up later — once large firms in the same vertical lock in the conversion layer, recruitment from inside that talent pool becomes **prohibitively expensive**.

Large firms · 1,000+ employees

Protect the Build tier. Fix the seniority pyramid.

Large firms already have AI staff — usually mixed across all four tiers. **The leverage point is no longer presence; it is depth, retention, and renewal.** This is where **Build retention has disproportionate national consequences**.

Five suggested moves

- **Treat Build-tier specialists as scarce strategic assets.** At **17 % lifetime drain** and **23 % in NLP / Generative AI**, every departure removes capability that cannot be replaced quickly in the Austrian market. Each Build worker anchors **more frontier capability than ten Adjacent analytics roles** (Schumacher et al. 2026a, ICIS — firm-value evidence).
- **Implement dual-track compensation.** Senior AI specialists at C-suite level currently earn **~5 % less than general-management peers** — a structural defection incentive away from the technical track. **Adjust senior technical bands upward** to remove the inversion.
- **Build deliberate pathways for women into the Build tier**: fellowships, sponsored research roles, return-to-work programmes. The capacity argument is strong — at **19 % female Build**, Austria draws from **barely half its potential frontier pool**.
- **Activate the conversion layer formally.** Even at scale, **internal mid-career mobility is faster and cheaper than international hiring** for most roles outside the technical frontier. The conversion thesis is empirical.
- **If headquartered abroad, treat the Austrian site as a strategic depth asset** (Core share **#3 in Europe**). Diluting it through low-end Adjacent hires is the failure mode. Schumacher et al. (2026b, ICIS) show that the **Invention × Application complementarity** predicts innovation output — **concentrating Build at the Austrian site is a value-creating choice**.

What not to do as a large firm

Do not respond to the slowdown by accelerating headcount-led expansion through Adjacent roles. That move dilutes the Core share that makes Austria distinctive on the European map. **The right response to slowing growth is better retention of the existing Build cohort, not faster shallow hiring.**

CHAPTER 04

04

Leadership Imperatives.

Five moves every AI leader must make.

Five cross-cutting imperatives that apply across firm size.

These translate the findings into decisions that cannot be delegated to IT, HR, or an external consultant.

01 IMPERATIVE	02 IMPERATIVE	03 IMPERATIVE	04 IMPERATIVE	05 IMPERATIVE
HIRING DISCIPLINE	STRATEGY ORIENTATION	WORKFORCE FRAMING	TALENT INCLUSION	CAPABILITY ARCHITECTURE
Hire to use, not to have.	**Business pulls, tech follows.**	**AI as workforce, not project.**	**Gender gap is a capacity gap.**	**Translation layer first.**

01

HIRING DISCIPLINE

Hire to use, not to have.

The strongest single explanation for the **44 % first-year departure rate** is not external pull — **it is internal under-utilisation**. Firms hire AI specialists under strategic pressure, then fail to provide enough serious project work. **Hire only when there is a real use-case backlog**, a data foundation that supports it, and a named business owner waiting.

02

STRATEGY ORIENTATION

No blind trust into technology. Solve real business issues.

AI-avatar pilots, generative chatbots, and headline-driven prototypes consume budget without solving business problems. **Run the question in reverse**: which workflow should improve, by how much, and how will we measure it? Then pick the tool. **Every AI initiative should map to a defined business KPI before resources are committed.**

03

WORKFORCE FRAMING

Treat AI as workforce, not project.

AI is a **permanent capability** that, like enterprise IT in the 1990s, will become embedded in every function. Companies that treat AI as a transformation project will under-invest in workforce continuity, training cycles, and career architecture. **The conversion-economy pattern documented in Finding 6 cannot be sustained through project budgets.**

04

TALENT INCLUSION

Address the gender gap as a capacity issue.

At **19 % female Build** and **26 % female Core AI**, Austria draws from a substantially narrower pool than it could. The capacity argument is independent of fairness: **every additional woman in Build raises the country's — and your firm's — frontier capability**. The intervention point is the **technical pipeline, not the integration tier**.

05

CAPABILITY ARCHITECTURE

Build the translation layer before the frontier.

Most Austrian companies do not need a Build-tier team. They need enough internal capability to identify AI opportunities, manage vendors, integrate tools, and evaluate output. That capability lives in the **Integrate and Enable tiers** — and it can be built by upgrading existing BI, ERP, automation, and data staff. Companies that try to hire frontier AI specialists before this layer end up with brilliant individuals who cannot land their work, and who **leave within twelve months**.

CHAPTER 05

05

Policy Actions for Austria.

Five actions to unlock company-level adoption.

The recommendations above describe **what companies can do on their own**.

The five actions below describe **what only public policy, chambers of commerce, regional development agencies, and university leadership can do** — and what must be done to make the company-level recommendations **viable at scale**.

01 ACTION	02 ACTION	03 ACTION	04 ACTION	05 ACTION
FUNDING DIRECTION	CONVERSION ECONOMY	MITTELSTAND ADVISORY	RISK & RETENTION	QUANTIFIED TARGETS
From supply to demand.	**Subsidise reskilling.**	**Regional SME advisors.**	**De-risk the first hire.**	**Funding tied to KPIs.**

01

FUNDING DIRECTION

Shift public AI funding from supply to demand.

Supply-side instruments alone — more graduates, more research, more compute — will not move the 97 %. Co-fund business-case development for SMEs (**vouchers up to EUR 15,000 per firm**, with outcome reporting). Deliver AI-readiness diagnostics as a public service, modelled on the Industrie 4.0 maturity assessments. **Replace activity-based reporting with outcome-based reporting** — firms moving from zero to first AI worker, year over year.

02

CONVERSION ECONOMY

Subsidise conversion, not just classroom training.

Introduce a **refundable AI-conversion tax credit** for firms that move existing adjacent staff (BI, ERP, automation, software, data) into formally designated AI-tier roles. **Per-employee upskilling budget up to EUR 5,000**, administered through AMS and WKO. National accreditation framework so SMEs can validate internal training against a recognised standard.

03

MITTELSTAND ADVISORY

Stand up a Mittelstand AI advisory service.

The SME segment (11–250) is the most movable cohort in the data. Embed regional AI advisors in chambers of commerce and Fachhochschulen, sector-specialised (industrial, services, professional, healthcare, retail). **Diagnostic-first engagement**: free initial readiness assessment, structured follow-up. Sector use-case libraries — published, maintained, **updated annually**.

04

RISK & RETENTION

De-risk the first AI hire and protect the frontier.

First-AI-Hire co-funding for SMEs: **25 % wage subsidy** for the first AI role in months 1–12, contingent on documented onboarding plan, project pipeline, and mentorship. **Frontier retention package**: competitive compute access, research sabbaticals, international collaboration grants, and Red-White-Red Card reform for AI professionals. Maintain an annual public Build-tier register — Austria has **~1,300 such specialists**; treat them as **critical national infrastructure**.

05

QUANTIFIED TARGETS

Tie public funding to quantified workforce targets.

Anchor the next policy cycle in **concrete density targets**: **1.10 Core / 1,000 by 2028** (match Germany), **1.40 / 1,000 by 2030** (DACH average). Track four supplementary KPIs: Build share of workforce; **female share of Core AI (target 35 % by 2030)**; first-year retention rate for AI hires; firms moving from zero to first AI worker. **Allocate funding against progress, not against programmes delivered.**

CHAPTER 05 · THE CORRIDOR

Vienna. Graz. Linz.

The deployment spine: 60 % of Core AI in Vienna, the top three states hold over 80 %. Reinforce — do not redistribute.

AI CORRIDOR

Vienna

60 %

SERVICES & GOVERNANCE HUB

Headquarters, finance, public sector. The deployment-density anchor.

AI CORRIDOR

Graz

~14 %

AUTOMOTIVE & INDUSTRIAL AI

Magna corridor, ICT-Süd cluster. Industrial-AI specialisation.

AI CORRIDOR

Linz

~9 %

MANUFACTURING AI

Voestalpine, JKU, K1 centres. Manufacturing-AI deployment depth.

The 24–48 % AI salary premium is present in every Austrian state — which makes AI upskilling the **highest-return investment** for regional workers and economies, even outside the corridor.

CHAPTER 05 · A 2030 TARGET SHEET

From measurement to outcomes.

Four metrics. One time horizon. Activity measurement must become outcome management.

DEPLOYMENT DENSITY	FRONTIER CAPACITY	GENDER PARTICIPATION	TALENT RETENTION
1.40	**13.5 %**	**35 %**	**70 %**
Core AI per 1,000 by 2030	*Build share of AI by 2030*	*Female share of Core AI by 2030*	*First-year AI-hire retention by 2030*

Match DACH average.

2025 · NOW
- 0.99 / 1,000 employed
- #19 of 38 in Europe

2030 · TARGET
- 1.40 / 1,000 (DACH avg)
- ~+1,700 specialists needed

NOTE
Stretch: 1.57 (Small Innovator median).

Lift the frontier base.

2025 · NOW
- 11.5 % Build share today
- ~1,300 specialists

2030 · TARGET
- 13.5 %+ Build share
- Frontier becomes scalable

NOTE
Each Build worker anchors capability.

Open the talent pool.

2025 · NOW
- 26 % female Core AI
- 19 % female Build tier

2030 · TARGET
- 35 % female Core AI
- Path toward non-AI parity (41 %)

NOTE
Capacity issue before equity issue.

Close the 12-month leak.

2025 · NOW
- ~56 % first-year retention
- 44 % brain-drain in year one

2030 · TARGET
- 70 %+ first-year retention
- Frontier capability anchored

NOTE
Front-load onboarding and ownership.

CHAPTER 06

06

Methodology & References.

Data spine, taxonomy, and the prior work that validates it.

Method note.

What this report does

This report measures Austria's AI workforce at the level of the individual worker. The data spine is Revelio Labs Workforce Intelligence, accessed under academic licence via Wharton Research Data Services (WRDS) at WU Vienna. The Austrian sample comprises 2.86 million position records covering 1.23 million unique workers across 188,265 firms over 2018–2025. Each record carries a standardised occupational classification drawn from Revelio's v3 role universe of approximately 17,000 categories, plus machine-imputed annual salary in EUR (ECB annual averages), machine-predicted binary gender, education, seniority (1–7), and resolved corporate parent. The primary segment is austria_located — every position physically located in Austria, comparable to Eurostat's place-of-work employment definition. Brain-drain and diaspora analyses use the total segment (all Austrian-trained workers, wherever currently located). Cross-country benchmarks use direct WRDS aggregate queries for 38 European peers.

Why this is the scientific standard

Individual-level workforce panels of this kind have become the standard empirical data source in the published AI-workforce literature. Babina, Fedyk, He and Hodson (2024, Journal of Financial Economics) use Revelio to identify firm AI investment in S&P 500 firms; Tambe (2025, Management Science) to study AI reskilling; Marchetti and Puranam (2026, Strategic Management Journal) to study firm cultures; Cheng (2025, Information Systems Research) uses a parallel platform-data spine to study AI labour shocks. Validation is independent and direct: Cai, Chen, Rajgopal and Azinovic-Yang (2024, Review of Accounting Studies) show Revelio's firm-level aggregates correlate strongly with hand-collected SEC disclosures; Liang, Lourie, Nekrasov and Shevlin (2025, Journal of Business Finance & Accounting) show close tracking of official labour statistics across industries and over time. Occupational exposure measures used in the brain-drain and complementarity chapters anchor on Eloundou, Manning, Mishkin and Rock (2024, Science) and Felten, Raj and Seamans (2023, Strategic Management Journal) — both built on the O*NET task backbone that the OECD AI Skills Indicator and the ILO/NASK Refined Global Index of Occupational Exposure to AI (2025) reference.

Our research programme — same pipeline, four peer-reviewed studies

The AI role taxonomy used here is not built for this report. It is the same role universe the authors developed and used across four coauthored studies (Schumacher et al., 2026; Schumacher and Tihanyi, 2026), specialised to the Austrian labour market with no Austria-specific recoding. The construction pipeline is identical across all four: (1) start from Revelio's v3 base taxonomy of ~17,000 fine-grained roles; (2) skill- and keyword-based filtering to identify the candidate AI universe; (3) ensemble coding combining rule-based classifiers and LLM-assisted coding; (4) independent expert validation by two to three external academic experts in AI and data science; (5) inter-rater reliability quantification.

Taxonomy at a glance

- 25 Build — roles that create AI capability from first principles (AI Research Scientist, Machine Learning Engineer, Deep Learning Engineer, Generative AI Engineer).
- 60 Enable — infrastructure, deployment, and governance roles that keep AI systems running at scale (MLOps Engineer, AI Solutions Architect, Cloud Platform Engineer, Data Governance Specialist, AI Quality Analyst).
- 257 Integrate — roles that embed AI in products, decisions, and business processes (AI Product Manager, Data Scientist, AI Strategist, AI Designer, Analytics Lead).[1]

[1] Caveats. Revelio is not a census: Austrian coverage is approximately 22.5 percent of Eurostat official employment, reflecting LinkedIn/XING penetration in the DACH region — within-country trends are robust; absolute cross-country headcount comparisons should carry the coverage caveat. 2025 figures are preliminary owing to profile-backfill lag. Gender classification is machine-predicted, binary, and roughly 95 percent accurate in aggregate. Salaries are machine-imputed; aggregate medians align with published Austrian salary surveys but individual-level uncertainty is high. Brain drain is defined as the next observed position being outside Austria, not as permanent emigration.

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