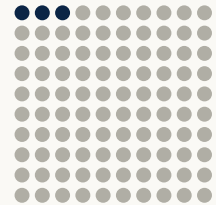


# 97 %



*Austrian firms employ zero AI workers.*

# The State of AI in Austria 2026

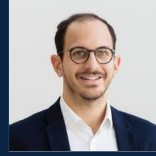
**A first independent measurement at the individual worker level. 1.9 million employment records, 107,532 firms, eight years, benchmarked against 37 European peers.**



**Christian Schumacher, PhD**

***Ass. Professor · Institute for Strategic Management · WU Wien***

Works with large-scale workforce datasets to study how firms allocate attention, capability and human capital under AI-driven discontinuity. Previously tenure-track Assistant Professor at Copenhagen Business School and Schumpeter Fellow at Harvard's Weatherhead Center. Marie Curie Fellow of the European Commission (2022–24). Teaches AI-Driven Decision-Making and AI for Business at WU Wien.



**Can Tihanyi, PhD**

***Ass. Professor · Institute for International Business · WU Wien***

Long arc in digitalisation: co-author of Austria's first federal Industrie 4.0 report for the ministry (2015) and a doctoral dissertation on digitalisation in International Business. Current research combines large-scale workforce datasets with causal inference to study how AI talent composition shapes innovation and firm value. Teaches Digitalisation & Social Media and Advanced AI Use in SME Internationalisation at WU Wien.

HEADLINE FINDING

# 97 % of Austrian firms employ zero AI workers.

**Of the 107,532 firms in Austria's panel, only 3.2 % employ at least one Core AI worker. The AI economy in Austria has roughly 4,000 winners and more than 100,000 spectators. The moat is narrower than every popular discussion of Austrian AI assumes, and it is the empirical anchor for the chapters that follow.**

Source: Revelio Labs via WRDS · austria\_located segment · Chapter 1, ecosystem panel. · Funding figure: OECD progress note on Austria (2025).

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FIRMS WITH AI STAFF



FIRMS WITH ZERO AI STAFF



# Why workforce is the question that matters.

AI is the most consequential general-purpose technology of this decade. The race to deploy it is being decided not in lab announcements but in labour markets — and Austria's position in that race has never been measured at the worker level. Until now.

The macro case is settled. McKinsey estimates generative AI alone could add USD 2.6–4.4 trillion in annual value to the global economy; Goldman Sachs puts the share of work tasks exposed to automation at roughly two-thirds in advanced economies. In successive global surveys, the share of executives naming AI a top strategic priority has roughly doubled in three years and now sits above 70 %. The firms and economies that integrate the technology first will compound an advantage the others cannot easily close.

Europe has read the signal. The EU AI Act sets the regulatory frame, the InvestAI initiative mobilises EUR 200 billion toward AI infrastructure and adoption, and member states are racing to position. Austria has committed to the AIM AT 2030 federal strategy, with roughly USD 350 million in fresh public AI funding through 2027 and a national digital-skills target of 70 % by 2026. The intent is unambiguous.

What remains opaque is the mechanism. Capital, compute and policy frames are visible in budgets and press releases. The variable that actually determines whether AI translates into productivity inside firms — the workforce that builds, deploys and operates it — is largely invisible in public data. Aggregate head-counts do not reveal whether the talent base is growing, whether seniority is renewing, whether women are present at scale, whether frontier talent stays in the country, or whether AI capability is concentrated in Vienna or diffused across regions. That is the gap this report closes.

This is the first worker-level read of Austria's AI workforce. The data spine is Revelio Labs's employment panel — 1.9 million workers attached to 107,532 firms, 2018–2025, AI-relevant roles flagged through a five-step pipeline ending in expert validation. The population is read along six dimensions — ecosystem, gender, brain drain, European benchmarking, seniority, region — and compared against thirty-seven European peers on identical definitions. Six findings follow.

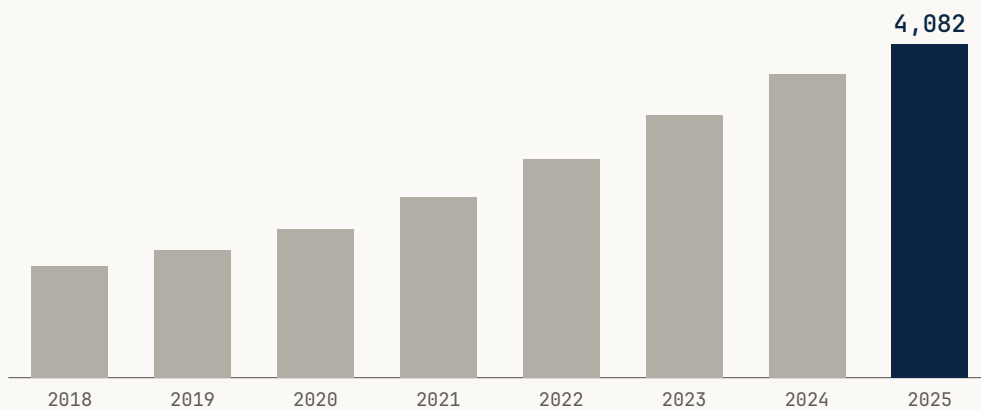
Christian Schumacher · Can Tihanyi

*Vienna · May 2026*

# 01 THE STRENGTH · CHAPTER 1

## The Core AI workforce tripled. Top-three in Europe.

**From 1,360 in 2018 to 4,082 in 2025. By Core AI share of employment, Austria ranks third out of thirty-eight European peers. The depth is real. So is the quality. The story does not end there.**

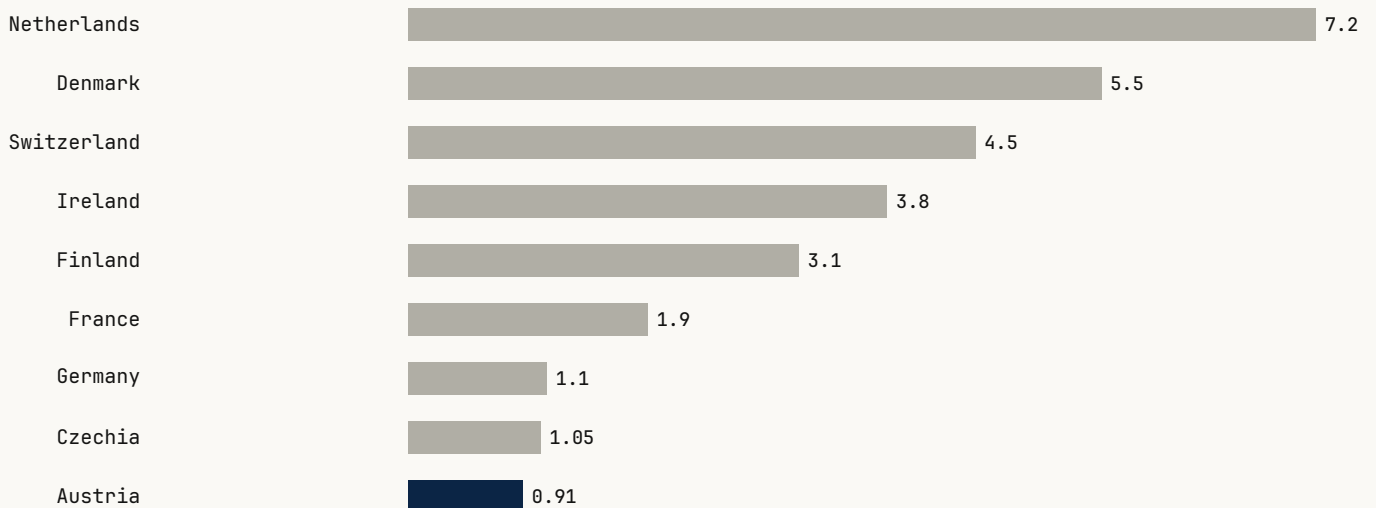


Source: Revelio Labs via WRDS · austria\_located segment · 2018-2025

## 02 THE SMALL BASE · CHAPTER 4

### Top-three on quality. Working from a small base.

**Austria places third out of thirty-eight on Core AI share of employment, the depth metric. On density it sits #19, behind Poland, Czechia, and Germany. The Netherlands and Denmark deploy five to eight times Austria's density per 1,000 employed. Quality is real. Scale is not.**

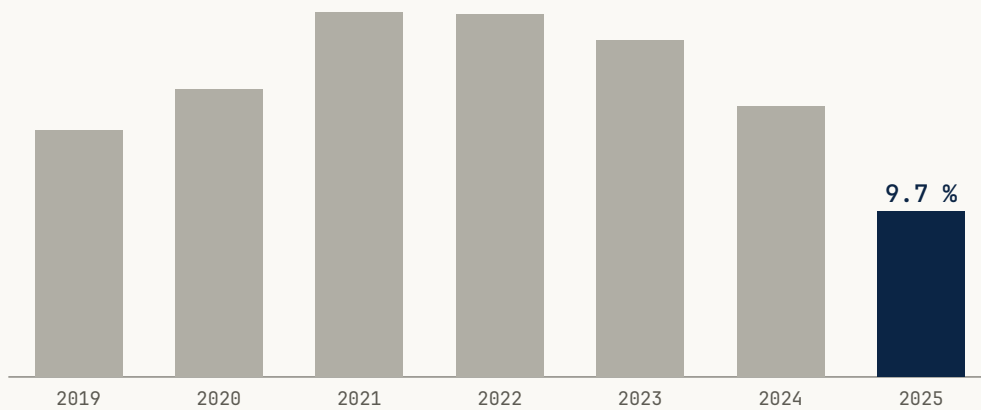


Source: Revelio Labs via WRDS · austria\_located segment · 2018-2025

## 03 THE BASE · CHAPTER 1

### Growth is declining.

**97 % of Austrian firms still employ no AI workers. The engine that should be filling that gap is slowing fast: annual growth has halved, from over 20 % at the 2021 peak to under 10 % in 2025. Inflows nearly doubled and outflows more than tripled, but the rate is the headline. At this pace, doubling Core AI from here takes more than a decade.**

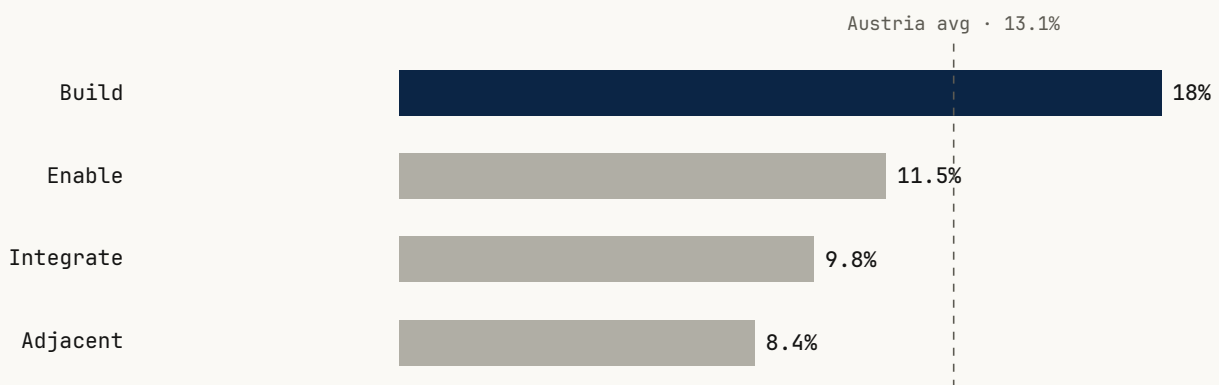


Source: Revelio Labs via WRDS · austria\_located segment · 2018-2025

## 04 THE FRONTIER · CHAPTER 3

### **Build-tier brain drain runs at 18 %. The frontier leaks fastest.**

**The most strategically valuable cohort leaves the fastest. Build is portable. Enable is anchored. The frontier leaks. The back office stays.**

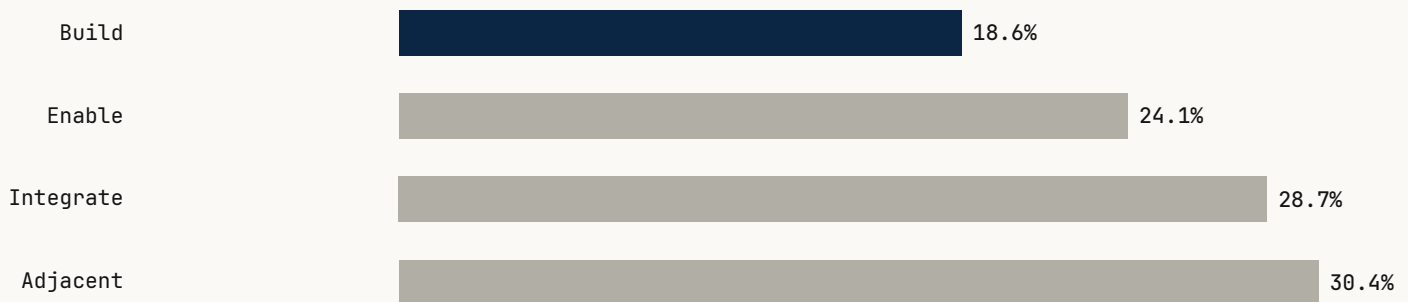


Source: Revelio Labs via WRDS · austria\_located segment · 2018-2025

## 05 THE GENDER GAP · CHAPTER 2

### 18.6 % female in Build. Lowest at the frontier.

**Adjacent and Integrate sit near 30 % female. Build collapses to 18.6 %. The most strategic tier is the most male-dominated. Lifting the Build-tier share by five points takes about fifty-five more women, and meaningfully shifts Austria's frontier capability.**

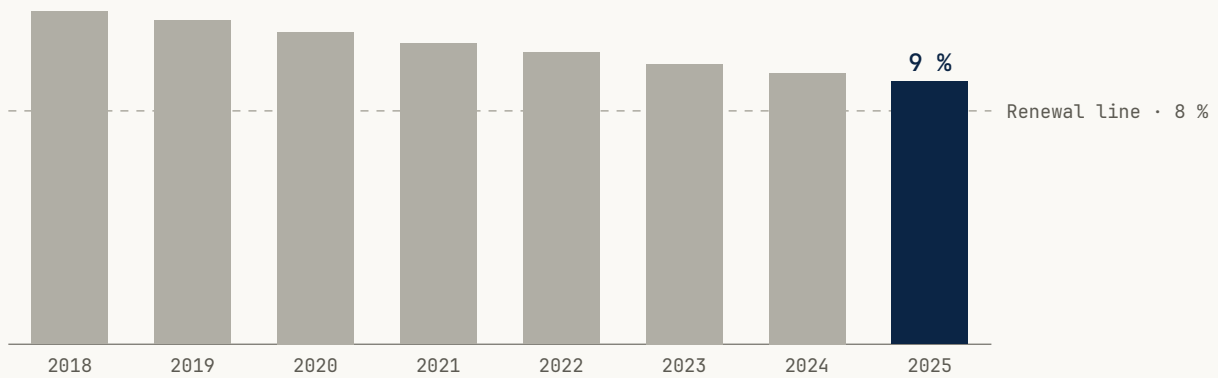


Source: Revelio Labs via WRDS · austria\_located segment · 2018-2025

## 06 THE PIPELINE · CHAPTER 5

### 9 % entry-level. The intake is shrinking.

**Entry-level share has slipped from 11.4 % in 2018 to 9.0 % in 2025. Hardly anyone new is coming in; the workforce is getting older without replacement. The slowest-moving of the findings, and the hardest to reverse once it stalls.**



Source: Revelio Labs via WRDS · austria\_located segment · 2018-2025

# Six chapters. One honest picture.

Each chapter opens with the sharpest single stat, rebuilds the argument from the data, and closes with a policy implication. Numbered, auditable, C-suite ready.

CHAPTER 01 P. 14

## 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.*

CHAPTER 02 P. 18

## Gender

The structural gap in Austria's AI workforce

# 60 yrs

to parity at current pace

*A cliff, not a slope. The pipeline enters balanced and collapses upward — at +0.3 pp / yr, parity is 60 years away.*

CHAPTER 03 P. 22

## Brain Drain

Where Austria's AI talent goes, and why

# 26.1 %

of NLP / GenAI leaves Austria

*Retention is solid at 67%. The real story is frontier leakage: 18% of Build, 26% of NLP / GenAI, half gone within twelve months.*

CHAPTER 04 P. 26

## Competitive Benchmarking

Austria's position in the European AI landscape

# +873

specialists needed to match Germany

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

CHAPTER 05 P. 30

## Seniority

Experience, leadership, and the pay inversion

# 3.6x

entry-level gap vs. non-AI

*Not a graduate cohort, a mid-career professional class. A 62% Analyst+Senior backbone — and a 9% entry-level floor with a hidden pay inversion at the top.*

CHAPTER 06 P. 34

## Region & Bundesland

Austria's AI geography — beyond Vienna

# 60.1 %

of Core AI in Vienna alone

*Vienna–Graz–Linz holds 90% + of Core AI. Graz's Core share (~45%) beats Vienna's (~39%). The corridor is the only viable axis.*