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Digital Decade 2026 country report

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COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS

State of the Digital Decade 2026: Closing structural gaps and mobilising investments for 2030 and beyond

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European Commission

DIGITAL DECADE COUNTRY REPORT 2026

Austria

Contents

Executive summary

Austria demonstrates solid strengths in digitalisation, with a strong digital skills base, good performance in the digitalisation of Small and Medium-Sized Enterprises (SMEs) and advanced digital public services for businesses, supported by a well-functioning digital identity ecosystem. The country also shows clear leadership in specific technological areas such as quantum and business adoption of Artificial Intelligence (AI). However, important gaps remain in the adoption of other advanced technologies like cloud and data analytics, where Austria lags behind the EU average. Connectivity deployment faces emerging structural and fiscal constraints, the growth of ICT specialists in employment remains insufficient and progress in digital public services for citizens, especially cross-border, remains slow.

These weaknesses may weigh on Austria's **competitiveness** in the medium term. Lower adoption of cloud and data analytics limits productivity gains and reduces SMEs' capacity to fully leverage digital transformation. At the same time, shortages of ICT specialists risk constraining innovation and the diffusion of advanced technologies across the economy. Meanwhile, slower progress in citizen-facing digital public services and interoperability may also limit efficiency gains in public administration and cross-border economic activity.

Nevertheless, Austria can rely on strong **digital leadership** assets. The country has a well-developed research and innovation ecosystem, particularly in quantum technologies, supported by sustained public investment and strong links between academia and industry. AI adoption is growing rapidly, with initiatives such as AI Factory Austria which aim to strengthen infrastructure and experimentation capacities. Austria also maintains a dynamic start-up ecosystem supported by public equity instruments, although scaling remains a challenge.

Austria in the Digital Decade

Austria shows a high level of ambition in its contribution to the Digital Decade having set 12 national targets (out of 14 possible), 92% of which aligned with the EU 2030 targets. In its national roadmap, Austria provided 12 trajectory points for 2025 (out of 13 analysed). The country is following them moderately well with 67% considered on track. Austria addressed 40% of the 5 recommendations issued by the Commission in 2025 by making some changes through new measures. According to the national roadmap, by the end of 2026, 48% of the measures will come to an end. The total public budget associated to these measures is EUR 3.36 billion, representing 83% of the total public budget outlined in the roadmap.

According to the special Eurobarometer on the Digital Decade 2026, **76% of Austrian people** consider that digital policy should have a very high/high priority for the EU in shaping our future in Europe. They also think that, in the next ten years, the EU should cooperate with Member States to **reinforce cybersecurity and protection from online threats (91%)**, **promote digital education and skills programmes (85%)** and **strengthen regulation of online platforms such as social networks and marketplaces (81%)**. In addition, **86% of Austrian respondents** think that the EU should reduce its dependencies on digital technologies from third countries, and **90%** that the EU should prioritise investments in digital infrastructure and services that are developed and controlled in Europe.

Meanwhile, **59%** would be willing to switch to an EU-based digital service provider even if it means slightly higher costs.

Funding for digital and multi-country projects

Austria allocates 35% of its total recovery and resilience plan to digital (EUR 1.3 billion). In addition, under cohesion policy, EUR 0.07 billion, representing 7% of the country's total cohesion policy funding, is dedicated to advancing Austria's digital transformation.

Austria is directly participating in the Important Project of Common European Interest (IPCEI) on Microelectronics and Communication Technologies (IPCEI-ME/CT). Austria is a participating state of the EuroHPC Joint Undertaking (JU) and the Chips JU.

Digital Decade KPI (1)	Austria				EU		Digital Decade target by 2030	
	Last available data (2)	DESI 2026 (year 2025)	Annual progress	National trajectory 2025 (3)	DESI 2026	Annual progress	AT	EU
Fixed Very High Capacity Network (VHCN) coverage	72.2%	76.3%	5.7%	75.0%	85.5%	3.7%	100.0%	100%
Fibre to the Premises (FTTP)	44.8%	50.9%	13.5%	47.0%	74.1%	7.1%	72.0%	-
Basic 5G coverage	99.5%	99.8%	0.3%	99.5%	96.8%	2.6%	100.0%	100%
Edge Nodes (estimate, new methodology)	-	210	-	-	7451	-	-	10000
SMEs with at least a basic level of digital intensity *	57.9%	73.0%	12.2%	76.0%	71.4%	11.0%	90.0%	90%
Cloud *	35.6%	41.7%	8.3%	-	46.7%	9.5%	-	75%
Artificial Intelligence	20.3%	30.0%	47.8%	29.1%	20.0%	48.0%	75.0%	75%
Data analytics *	23.9%	26.3%	4.9%	38.5%	39.9%	9.5%	75.0%	75%
AI or Cloud or Data analytics *	47.0%	58.1%	11.2%	-	63.2%	7.5%	-	75%
Unicorns	4	4	0.0%	5	324	10.2%	10	500
At least basic digital skills *	64.7%	69.8%	3.9%	68.3%	60.4%	4.3%	80.0%	80%
ICT specialists	5.3%	5.4%	1.9%	5.9%	5.0%	2.0%	10.0%	~10%
e-ID scheme notification		Yes						
Digital public services for citizens	80.8	83.7	3.6%	85.0	84.6	2.8%	100.0	100
Digital public services for businesses	87.7	88.8	1.3%	85.0	88.6	2.7%	100.0	100
Access to electronic health records	87.0	89.1	2.4%	97.5	86.5	4.6%	100.0	100

(1) Indicators full description, metadata and sources in the DESI 2026 methodological note
(2) Last available data is DESI2025 (reference year 2024) except for indicators marked with a star * for which it is DESI2024 (reference year 2023)
(3) National trajectory value for 2025, if set by the country in its Digital Decade national roadmap

A competitive, sovereign and resilient EU based on technological leadership

Austria performs relatively well in SME digitalisation, with a share of digitally intensive SMEs above the EU average, but uptake of advanced technologies remains uneven, especially for cloud and data analytics. Connectivity coverage is progressing but may face slowing momentum due to fiscal constraints and market conditions, particularly in fibre deployment. While AI adoption is accelerating

and supported by policy initiatives, broad-based diffusion across the economy is still a work in progress. Austria also benefits from a dynamic start-up ecosystem and supportive public financing instruments, but the number of unicorns has remained unchanged and scale-up financing conditions remain comparatively limited, pointing to persistent challenges in translating innovation potential into high-growth firms.

Protecting and empowering EU people and society

Austria benefits from a strong level of basic digital skills, with performance above the EU average and a relatively inclusive distribution across regions and age groups. However, the share of ICT specialists remains below EU targets and current measures focus mainly on long-term education pipelines, with more limited impact on immediate labour market needs, which may also constrain the diffusion of digital technologies across the economy.

Austria has made steady progress in digital public services, particularly for businesses, supported by a well-developed digital identity system and efficient e-government infrastructures. However, progress for citizen-facing services - especially cross-border - remains more limited due to interoperability challenges and resource constraints. Digital health services are well established through existing infrastructures, but further improvements depend on continued investments in integration and system modernisation.

Recommendations

- **Connectivity**: Accelerate the deployment of fibre-to-the-premises infrastructure and strengthen end-user take-up, in particular by: i) scaling up fibre rollout through coordinated funding programmes and regulatory measures at both national and regional (Länder) levels, ensuring a geographically balanced deployment that adequately covers rural and underserved areas; ii) supporting, via targeted measures and appropriate regulatory intervention, as appropriate, end- users' connections, so as to reduce the gap between fibre network availability and actual subscriber uptake; iii) foster the copper networks switch-off, in alignment with the pace of fibre rollout and with adequate consumer safeguards
- **Advanced digital technologies uptake**: Accelerate the adoption of cloud and data analytics, particularly among SMEs, by introducing more targeted measures that stimulate demand for cloud and data analytics solutions
- **ICT specialists**: Austria should complement its strong long-term education investments with more immediate actions to address persistent ICT skills shortages. This should include scaling up reskilling and upskilling programmes, promoting enterprise-based training, and facilitating the attraction of foreign ICT talent, with a particular focus on applied digital skills relevant for business adoption (e.g. data, cloud, AI).
- **Digital Public Services**: Austria should prioritise the modernisation and interoperability of its digital public service infrastructure to accelerate progress for citizens. Efforts should focus on scaling the once-only principle across all levels of government, addressing fragmentation and legacy systems, and ensuring full alignment with EU frameworks such as the European Digital Identity Wallet to unlock cross-border services.
- **Unicorns:** Austria should accelerate the implementation of measures to improve access to growth capital and support the scaling of innovative companies. While recent initiatives, including the planned Startup and Scale-up Fund, represent important progress, further

efforts are needed to mobilise private investment, facilitate larger funding rounds, and improve the overall scale-up environment. This should be complemented by measures to enhance international visibility, attract foreign investors, and support the expansion of high-growth firms into global markets.

A competitive, sovereign and resilient EU based on technological leadership

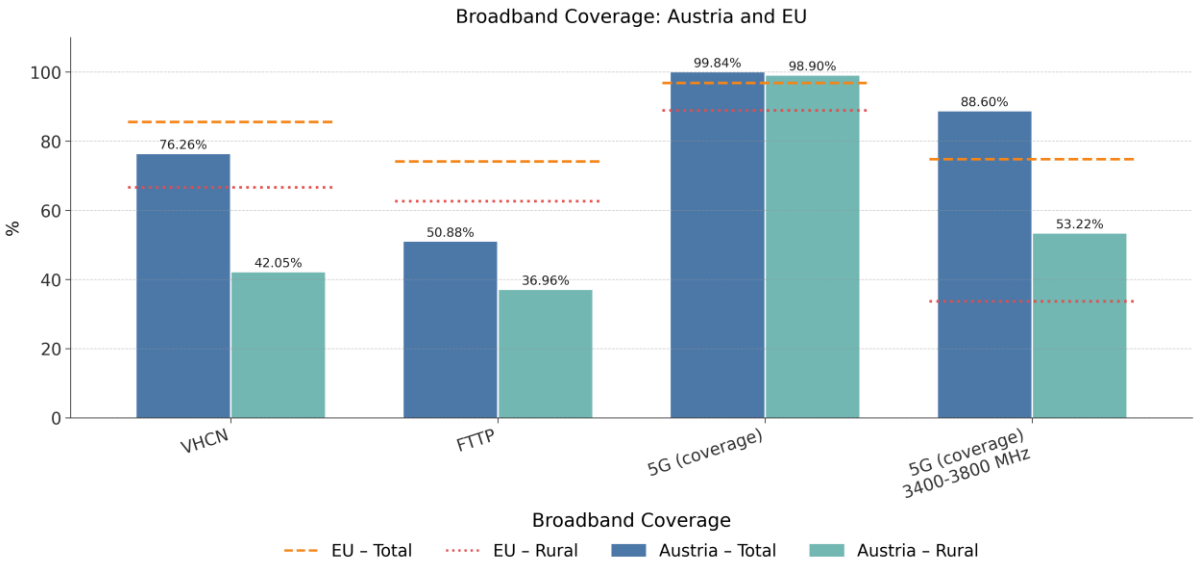
Building technological leadership: digital infrastructure and technologies

Connectivity infrastructure

Performance assessment

Austria reached 72.16% of very high capacity network (VHCN) coverage in 2024, below the EU average of 82.49%. In 2025, its coverage increased to 76.26%, which, although an improvement, remains below the EU average of 85.54%. The annual growth rate for Austria was 5.7%, outpacing the EU's growth rate of 3.7%. Despite this positive growth, Austria's overall coverage still lags behind the EU average.

Austria was at 44.82% of fibre to the premises (FTTP) coverage after an increase of +13.5% in 2024, and is below the EU average of 69.24%. In 2025, its coverage improved to 50.88%, but it still remains below the EU average of 74.13%. Although Austria's annual growth rate of 13.5% surpasses the EU's growth rate of 7.1%, the country continues to lag behind in overall coverage.



Austria was at 99.55% of overall 5G coverage thanks to an increase of +0.3% in 2024, and is above the EU average of 94.35%. In 2025, its coverage further increased to 99.84%, maintaining its position above the EU average of 96.79%. However, Austria's annual growth rate of 0.3% is lower than the EU's growth rate of 2.6%. Despite this slower growth, Austria's overall 5G coverage remains impressive.

For households living in sparsely populated areas, Austria's 5G coverage was 97.85% in 2024, significantly higher than the EU average of 79.58%. In 2025, its coverage increased to 98.9%, while the EU average rose to 88.88%. Austria's annual growth rate in this category was 1.1%, much lower than the EU's growth rate of 11.7%. Austria leads in overall coverage, but the slower growth rate in rural areas is cause for concern.

Austria

Austria was at 83.97% of 5G coverage in the 3.4-3.8 GHz band in 2024, and is above the EU average of 67.6%. In 2025, its coverage increased to 88.6%, keeping it above the EU average of 74.75%. However, Austria's annual growth rate of 5.5% is lower than the EU's growth rate of 10.6%.

For households living in sparsely populated areas, Austria's 5G coverage in this band was 51.85% in 2024, more than double the EU average of 25.36%. In 2025, its coverage increased to 53.22%, while the EU average rose to 33.71%. Austria's annual growth rate in this category was 2.7%, significantly lower than the EU's growth rate of 32.90%. Despite this slower growth, Austria maintains a substantial lead in 5G coverage in the 3.4-3.8 GHz band.

For households living in sparsely populated areas, Austria's VHCN coverage was 42.17% in 2024, significantly below the EU average of 61.87%. In 2025, its coverage decreased slightly to 42.05%, while the EU average rose to 66.66%. Austria's annual growth rate in this category was -0.3%, far below the EU's growth rate of 7.7%. This indicates a worrying trend, with Austria falling further behind in providing VHCN coverage for rural areas.

For households living in sparsely populated areas, Austria's FTTP coverage was 33.89% in 2024, lower than the EU average of 58.76%. In 2025, its coverage increased to 36.96%, but it is still below the EU average of 62.51%. Austria's annual growth rate in this category was 9.1%, above the EU's growth rate of 6.5%. Austria is making progress in expanding FTTP coverage in rural areas, but still has some way to go to reach the EU average.

The table below gives an overview of VHCN, FTTP and 5G coverage across NUTS-2 regions in Austria.

	VHCN coverage		FTTP Coverage		5G Coverage	
	Overall	Rural	Overall	Rural	Overall	Rural
National coverage	76.26%	42.05%	50.88%	36.96%	99.84%	98.90%
Burgenland	80.36%	39.54%	20.64%	19.38%	99.98%	99.86%
Kärnten	44.55%	15.24%	34.77%	15.11%	99.82%	99.27%
Niederösterreich	64.65%	46.21%	42.59%	43.90%	99.87%	99.28%
Oberösterreich	80.81%	58.41%	51.94%	55.48%	99.89%	99.56%
Salzburg	90.08%	57.19%	51.14%	22.81%	99.67%	97.19%
Steiermark	60.15%	26.17%	40.64%	22.51%	99.76%	98.54%
Tirol	80.93%	55.84%	68.82%	53.26%	99.46%	96.22%
Vorarlberg	78.23%	23.10%	28.18%	14.20%	99.89%	98.45%
Wien	94.38%	10.92%	69.20%	9.98%	100.00%	99.22%

Austria reached 53.4% in 2025 for its 5G SIM cards share of the total population, marking an increase from 29.11% in 2024. This figure remains slightly below the EU average, which was 55.55% in 2025 and 35.56% in 2024. However, Austria's annual growth rate of 83.4% surpassed the EU's growth rate of 56.2%, indicating a robust expansion in 5G adoption relative to the broader European trend.

Austria's share of fixed broadband subscriptions with speeds of 1 Gbps or higher was 2.23% in 2025, up from 1.16% in 2024. This is a significant improvement, but it remains well below the EU average, which was 26.97% in 2025 and 22.25% in 2024. Austria's annual growth rate of 92.8% for this indicator surpassed the EU's growth rate of 21.2%, suggesting a rapid, albeit modest in absolute terms, advancement in high-speed broadband adoption in the country.

Policy context and assessment of recommendations

Austria's connectivity policy continues to rely primarily on the Broadband Austria 2030 (BBA2030) programme as the central instrument supporting fibre deployment. However, developments in 2025 suggest that the pace of public support may slow down in the coming years due to fiscal constraints.

Following the formation of the new government in March 2025, the planned funding call under BBA2030 for that year was cancelled for budgetary reasons. Austrian authorities have indicated that funding availability for future calls remains uncertain, which may affect the continuation of the current deployment trajectory.

Deployment dynamics are influenced by relatively low fibre take-up rates in some areas. Stakeholders reported that demand constraints reduced incentives for operators to invest, particularly where deployment costs are high. In rural areas, the limited number of households and higher per-household connection costs make fibre deployment economically challenging. In urban areas, deployment may also face technical barriers related to building cabling and installation works inside multi-dwelling buildings. End-user reluctance to undertake installation works on private property has also been identified as a factor slowing down adoption.

At the same time, mobile broadband continues to be a big part of Austria's connectivity landscape. Many households rely on mobile broadband routers (mobile cubes) as an alternative to fixed broadband connections. This situation partly reflects the early development of competitive flat-rate mobile offers and the presence of a mobile network operator without fixed infrastructure, which historically contributed to strong competition in the mobile market. While this model has supported widespread connectivity, it may also influence demand dynamics for fixed fibre connections.

Legacy copper infrastructure remains a major issue for the medium-term evolution of the fixed network. Discussions between operators and the regulator on a possible copper switch-off began in 2024 through a series of workshops exploring potential migration scenarios. However, no formal copper switch-off strategy or timeline has been established. Operators have so far refrained from launching pilot projects or committing to a transition plan, partly due to uncertainty regarding fibre deployment strategies and investment plans. As a result, copper network decommissioning remains at an exploratory stage.

Authorities also highlighted uncertainties regarding the upgrade of existing digital subscriber line (DSL) connections, particularly in areas where private operators are expected to deploy fibre infrastructure. The availability of detailed deployment data from operators remains limited. This complicates the planning and monitoring of infrastructure upgrades.

From a regulatory perspective, **Austria is preparing to transpose the Gigabit Infrastructure Act (GIA) into national law through amendments to telecommunications legislation**. According to national authorities, discussions on the transposition are expected to take place later in 2026, although the exact timeline remains unclear. The federal structure of Austria, where municipalities and regional authorities have significant responsibilities in permitting and infrastructure deployment, may also complicate the implementation of measures aimed at accelerating roll-out.

Regarding mobile networks**, Austria continues to rely primarily on coverage obligations introduced through spectrum auctions to ensure network deployment**. The regulatory authority recently carried out a spectrum auction covering the 2.3 GHz and 2.6 GHz bands. Given the already high level of mobile network coverage, these auctions do not include additional coverage obligations. Austria has not yet

established a formal strategy or regulatory framework for the switch-off of legacy copper networks. According to authorities, no legislative initiatives or regulatory measures are in place to mandate or coordinate the migration from copper to fibre infrastructure.

Preliminary discussions between the regulator and market operators took place in 2024 addressing possible approaches to copper switch-off, including the types of services affected and the potential use of pilot projects to test migration processes.

The regulator indicated that discussions with operators were expected to resume during 2026 in order to reassess the conditions for a possible transition from copper to fibre networks. At this stage, however, no copper switch-off timeline or measures have been defined. The switch-off of copper networks remains crucial to ensure the take-up of fibre. Such measures are essential to support investments, fully unlock the benefits of the connectivity ecosystem and maximise the socio-economic value of high-speed infrastructure.

2025 recommendation on FTTP roll-out: Sustain and further accelerate the pace of fibre rollout (FTTP), particularly in rural areas, by maintaining strong investment and encouraging new deployment commitments
In 2025, Austria continued the implementation of existing measures but did not take any new measure. In particular, it continued to implement existing measures under the Broadband Austria 2030 (BBA2030) initiative but did not introduce new policy initiatives to further accelerate roll-out. Developments in 2025 indicate that the pace of public support may slacken, as the planned funding call under BBA2030 was cancelled for budgetary reasons. Relatively low fibre take-up in certain areas also continues to weaken the business case for investment, particularly in rural areas with higher deployment costs and lower population density. Structural factors such as technical constraints in multi-dwelling buildings and end-user reluctance to undertake installation works also slow uptake down. Austria continues to use a combination of public funding, private investment and regulatory incentives to support connectivity deployment. However, current developments suggest that maintaining and accelerating the pace of FTTP roll-out – particularly in rural areas – may require renewed investment efforts and stronger incentives to stimulate both supply and demand.

Semiconductors

Austria continues to support the development of the European semiconductor ecosystem through targeted investments and participation in EU-level initiatives under the European Chips Act. A key development concerns the implementation of the project led by the company ams OSRAM, which aims to establish a first-of-its-kind semiconductor integrated production facility in the EU. The project has received the first tranche of approved State aid budget, amounting to EUR 227 million, and is progressing according to plan, with completion expected between 2027 and 2028.

As part of the State aid approval, ams OSRAM is committed to ensuring that the project generates broader benefits for the European semiconductor ecosystem. In particular, it agreed to help strengthen the EU semiconductor value chain, support the development of advanced manufacturing capabilities in the EU, and implement priority-rated orders in the event of supply shortages, in line with the European Chips Act. The project also includes dedicated efforts to support workforce development through education and training initiatives aimed at expanding the pool of skilled professionals in the semiconductor sector.

Austria is also contributing to skills development initiatives under Pillar 1 of the European Chips Act, notably through the Chips for Europe initiative, which aims to make the semiconductor sector more visible and attractive while supporting the development of higher education and vocational training networks. In this context, the Austrian Chips Competence Center (AT-C3) plays a central role. The centre operates as a public-private consortium that supports semiconductor innovation and facilitates collaboration between industry, research institutions and SMEs. Its activities include the development of training programmes and new education formats designed to boost semiconductor-related skills across Europe.

Further skills development initiatives are expected under the Chips Joint Undertaking, in which Austria plans to participate. These include upcoming calls focused on semiconductor skills development, in particular the creation of a Skills Hubs of Excellence, which will serve as entry points for learners, teachers and companies by providing mentoring and hands-on training opportunities linked to industry needs. Additional initiatives include the establishment of a pilot federation of vocational education and training (VET) aimed at bridging the talent gap in the semiconductor sector by supporting reskilling and upskilling programmes in close cooperation with industry actors, as well as initiatives targeting chip design capabilities to strengthen Europe's talent pipeline in semiconductor design.

At this stage, Austrian authorities believe that the existing instruments under the European Chips Act and the Chips for Europe initiative address current policy needs. No additional national measures are envisaged. However, Austria is preparing to participate in the candidate Important Project of Common European Interest (IPCEI) on advanced semiconductor technologies (AST), to further strengthen its involvement in the European semiconductor ecosystem.

Looking ahead, authorities have indicated that further policy developments may depend on the evolution of the EU semiconductor strategy, in particular the expected publication of a potential Chips Act 2 in 2026. If new instruments or policy priorities emerge at EU level, Austria may assess the need to adapt its national approach accordingly.

Edge nodes

Performance assessment

According to the Edge Node Observatory, Austria is estimated to have deployed a total of 210 edge nodes by 2025. Due to a change in methodology, this number cannot be compared to previous estimations.

Policy context and assessment of recommendations

Austria has not introduced dedicated policy measures or funding schemes to support the deployment of edge nodes. The development of edge computing infrastructure is expected to be driven primarily by private sector investment, particularly by mobile network operators and data centre operators. Edge infrastructure is therefore not currently a specific policy focus in Austria's national Digital Decade roadmap.

The deployment of edge nodes remains closely linked to the development of 5G standalone (5GSA) networks. At present, only one mobile network operator operates a 5GSA network in parts of Austria, which limits the emergence of edge computing capabilities in mobile networks. This operator

estimates that its network includes a limited number of nodes that could be considered edge infrastructure. The other mobile operators have not yet deployed 5GSA networks and have indicated that they cannot technically relate their current network architecture to the definition of edge nodes in the Digital Decade framework. As a result, the availability of edge computing capabilities in Austrian telecommunications infrastructure remains limited.

National authorities emphasised that mobile network operators remain primarily focused on fulfilling existing coverage obligations linked to spectrum licences, particularly those related to basic mobile broadband coverage. Introducing additional policy requirements related to edge node deployment is therefore not currently considered feasible, as operators already have significant investment requirements to fulfil in order to fulfil these coverage obligations. Authorities have also indicated that imposing additional regulatory or funding conditions related to edge infrastructure would likely face strong resistance from market actors.

At the same time, Austria is witnessing increasing investment in data centre infrastructure, which may gradually support the development of distributed computing capacities relevant for edge computing use cases. Stakeholders reported growing commercial interest in data processing and cloud-related infrastructure, driven in particular by rising demand for digital services and data-intensive applications such as video content and AI workloads. Several new data centre projects are being developed, reflecting broader market demand for data processing capacity.

Nonetheless, authorities have indicated that demand for dedicated edge computing services remains limited at this stage and that the market has not yet clearly identified sustainable business models for edge node deployment. The development of edge infrastructure is therefore expected to occur gradually as part of broader cloud and data centre investments, rather than through targeted policy support.

Quantum technologies

Austria continues to perform very well in quantum technologies, supported by a well-established research ecosystem and sustained public investment. The **Quantum Austria initiative**, financed with **EUR 107 million from the Recovery and Resilience Facility**, supports research and innovation projects in areas such as quantum computing, communication and sensing, to strengthen both scientific excellence and the development of practical applications. As part of the implementation of this initiative, a final milestone envisaged is the signature of performance agreements with universities, so that the projects funded under the Quantum Austria initiative are integrated into universities' regular operations. This is expected to provide long-term continuity for quantum research activities and support the emergence of academic spin-offs.

Austria's quantum ecosystem benefits from close links between research institutions, start-ups and industry, particularly in clusters around **Vienna and Innsbruck**, which specialise in areas such as quantum computing and photonic technologies. Several start-ups and spin-offs have emerged from academic research, supporting the translation of scientific advances into industrial applications. The **Federal Ministry of Women, Science and Research** supports these developments through measures aimed at strengthening knowledge and technology transfer and facilitating the creation of innovative academic spin-offs, including the **spin-off fellowship initiative** and dedicated provisions in university performance agreements that promote entrepreneurship and increase the number of spin-offs.

Recent initiatives aim to further strengthen this ecosystem and facilitate technology transfer. For example, the **Quantum Hub Tirol**, launched in 2025, seeks to connect advanced research capabilities with industry applications and accelerate the commercialisation of quantum technologies. The

'excellent=Austria' excellence initiative also supports clusters of excellence and emerging research fields in key technological areas, including quantum technologies, with a particular focus on boosting Austria's research and innovation landscape and facilitating the transfer of research results to the economy.

To further support the commercialisation of research results, several federal ministries — including the **Federal Ministry of Women, Science and Research**, the **Federal Ministry of the Economy, Energy and Tourism**, and the **Federal Ministry of Innovation, Mobility and Infrastructure** — cooperate through the **IP National Contact Point** to strengthen intellectual property management and help universities, research institutions and companies bring new technologies to market. Overall, Austria's policy approach places a strong emphasis on supporting the full innovation chain – from fundamental research to potential economic applications – supported by dedicated funding instruments and collaborative research programmes. Quantum technologies are not yet expected to have the same immediate economic impact as other digital technologies such as AI. However, Austrian authorities view the sector as a strategic long-term investment area where the country currently has strong scientific and technological capabilities.

Supporting EU-wide digital ecosystems and scaling up innovative enterprises

SMEs with at least basic digital intensity

Performance assessment

Austria is at 72.99% of SMEs with at least a basic level of digital intensity index after an annual progression of 12.2% between 2023 and 2025, standing above the EU average of 71.39%. In 2023, the figure for Austria was 57.93%, slightly higher than the EU average of 57.9%. Austria's annual growth rate of 12.2% outpaces the EU's growth rate of 11.0%, indicating a stronger performance in the digitalisation of SMEs. However, when examining SMEs with a very high digital intensity index, Austria's performance is less favourable. In 2025, 9.01% of Austrian SMEs achieved a very high digital intensity, marginally below the EU average of 9.07%. In 2023, the figure for Austria was 4.87%, compared to the EU's 4.38%. Despite this, Austria's annual growth rate of 36.0% in this category is lower than the EU's growth rate of 43.9%, suggesting that while Austria is making progress, it is doing so at a slower pace than the EU average.

Policy context and assessment of recommendations

Austria continues to mainly use existing support instruments to promote the digitalisation of SMEs, particularly the **SME.DIGITAL programme** and the network of European digital innovation hubs (EDIHs). These initiatives combine financial incentives, advisory services and training programmes aimed at helping SMEs to adopt digital technologies and strengthen their digital capabilities. According to national authorities, these schemes remain the main ways of reaching companies with lower levels of digital maturity and supporting their digital transformation across different sectors and regions.

Besides the continuation of these programmes, Austria has introduced legislative measures to strengthen the broader framework conditions for the data economy. In July 2025, the Data Access Act (*Datenzugangsgesetz* – DZG) entered into force, implementing the EU Data Governance Act at national level. The legislation aims to improve access to and the availability of data, thereby facilitating the development of data-driven services and reducing barriers to the use by businesses, including SMEs, of digital technologies. As part of its implementation, the Federal Chancellery established the

competent authority responsible for registering data intermediation services and data altruism organisations, while work is ongoing with Statistics Austria to set up a single information point for the re-use of protected data.

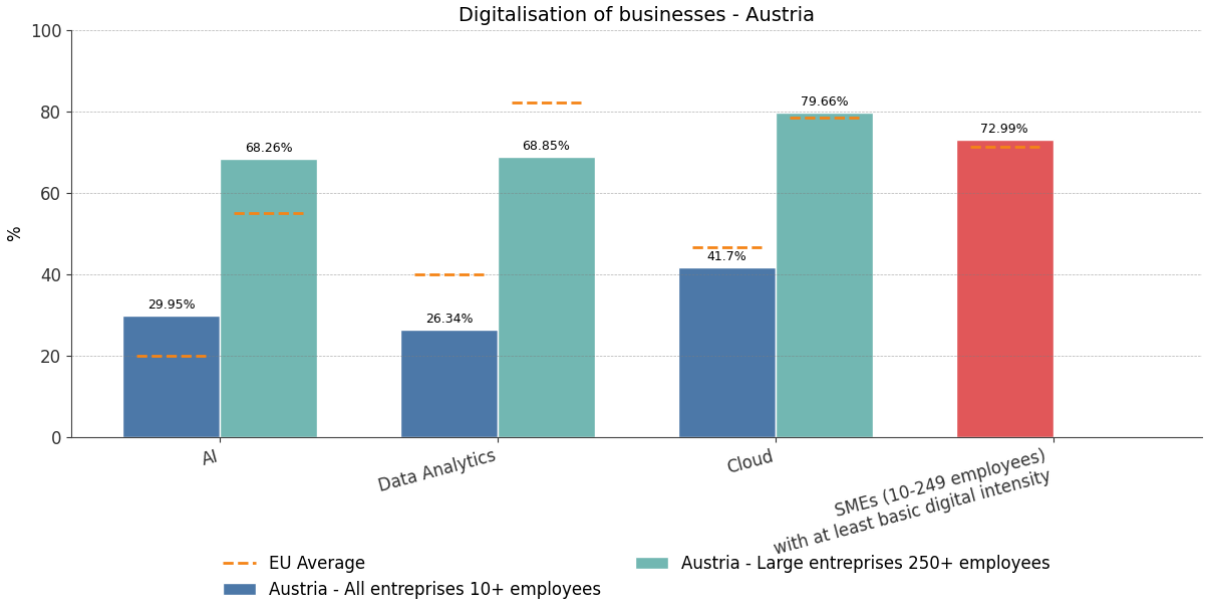
Austria is also progressing with the implementation of its national data strategy, adopted in October 2024. Preparatory work is underway to establish federal coordination structures to ensure coherent implementation across ministries. Cross-ministerial consultations are ongoing to align implementation strategies and ensure coordination between the different policy initiatives contributing to the data economy. In parallel, Austrian authorities are working with stakeholders on the national implementation of the High-Value Datasets Implementing Regulation, aimed at facilitating the publication and re-use of public sector datasets. Consultations are also ongoing to determine Austria's participation in European data spaces, including the identification of priority sectors and potential use cases.

Instead of using a single centralised funding instrument, Austria allocates financial support for these initiatives in the respective project frameworks on a case-by-case basis. This approach aims to provide targeted support for specific projects and initiatives contributing to the achievement of the objectives of the national Digital Decade roadmap.

Overall, Austria's approach to improving SME digital intensity continues to rely on the gradual strengthening of the digital ecosystem through advisory services, skills development and improved access to data and digital infrastructures. Several initiatives aim to improve the enabling framework conditions for digital transformation, but authorities expect existing programmes and innovation networks to remain the main ways of helping SMEs to adopt digital technologies.

Take up of advanced technologies

Performance assessment



In the realm of data analytics, Austria is at 26.34% after an annual progression of 4.9% since 2023, which is considerably lower than the EU average of 39.85%. In 2023, the figure for Austria was 23.94%, compared to the EU's 33.25%. Austria's annual growth rate of 4.9% is lower than the EU's growth rate of 9.5%, indicating a slower adoption rate. Focusing on SMEs, 24.99% of Austrian SMEs adopted data analytics in 2025, following an annual progression of 4.3%, which is lower than the EU average of 38.59%. In 2023, the figure for Austria was 22.98%, compared to the EU's 32.09%. Austria's

annual growth rate of 4.3% is lower than the EU's growth rate of 9.7%. For large enterprises, 68.85% adopted data analytics in 2025, after an annual progression of 11.1%, which is lower than the EU average of 82.03%. In 2023, the figure for Austria was 55.79%, compared to the EU's 71.81%. Austria's annual growth rate of 11.1% is higher than the EU's growth rate of 6.9%, suggesting that larger Austrian enterprises are closing the gap with their EU peers.

In terms of cloud technologies, Austria is at 41.7% after an annual progression of 8.3% since 2023, which is lower than the EU average of 46.69%. In 2023, the figure for Austria was 35.56%, compared to the EU's 38.97%. Austria's annual growth rate of 8.3% is lower than the EU's growth rate of 9.5%. For SMEs, 40.49% adopted cloud technologies in 2025, following an annual progression of 8.5%, which is lower than the EU average of 45.74%. In 2023, the figure for Austria was 34.37%, compared to the EU's 38.04%. Austria's annual growth rate of 8.5% is lower than the EU's growth rate of 9.7%. For large enterprises, 79.66% adopted cloud technologies in 2025, after an annual progression of 2.8%, which is higher than the EU average of 78.32%. In 2023, the figure for Austria was 75.39%, compared to the EU's 69.72%. Austria's annual growth rate of 2.8% is lower than the EU's growth rate of 6.0%.

In the adoption of artificial intelligence, Austria is at 29.95% after an annual progression of 47.8% since 2024, which is higher than the EU average of 19.95%. In 2024, the figure for Austria was 20.27%, compared to the EU's 13.48%. Austria's annual growth rate of 47.8% is slightly lower than the EU's growth rate of 48.0%. For SMEs, 28.73% adopted AI in 2025, following an annual progression of 48.4%, which is higher than the EU average of 18.9%. In 2024, the figure for Austria was 19.36%, compared to the EU's 12.64%. Austria's annual growth rate of 48.4% is lower than the EU's growth rate of 49.5%. For large enterprises, 68.26% adopted AI in 2025, after an annual progression of 36.7%, which is higher than the EU average of 55.03%. In 2024, the figure for Austria was 49.94%, compared to the EU's 41.17%. Austria's annual growth rate of 36.7% is higher than the EU's growth rate of 33.7%.

When considering the adoption of AI, cloud, or data analytics technologies together, Austria is at 58.12% after an annual progression of 11.2% since 2023, which is lower than the EU average of 63.2%. In 2023, the figure for Austria was 47.03%, compared to the EU's 54.7%. Austria's annual growth rate of 11.2% is higher than the EU's growth rate of 7.5%. For SMEs, 57.05% adopted these technologies in 2025, following an annual progression of 11.5%, which is lower than the EU average of 62.32%. In 2023, the figure for Austria was 45.9%, compared to the EU's 53.74%. Austria's annual growth rate of 11.5% is higher than the EU's growth rate of 7.7%. For large enterprises, 91.76% adopted these technologies in 2025, after an annual progression of 4.0%, which is lower than the EU average of 92.78%. In 2023, the figure for Austria was 84.77%, compared to the EU's 86.71%. Austria's annual growth rate of 4.0% is higher than the EU's growth rate of 3.4%.

Policy context and assessment of recommendations

Austria has recently taken steps to strengthen the framework conditions for the adoption of advanced digital technologies, especially through measures targeting the data economy, AI infrastructure and research programmes. These initiatives aim to facilitate the availability of data, expand access to computing resources and support the development of AI applications across the economy.

A key legislative development is the entry into force of the Data Access Act (*Datenzugangsgesetz* – DZG) in July 2025, implementing the EU Data Governance Act at national level. The legislation seeks to improve the conditions for sharing and re-using data, thereby enabling businesses to access and use

data more easily for cloud computing and data analytics applications. As part of the implementation of the DZG, the Federal Chancellery has established the competent authority responsible for registering data intermediation services and data altruism organisations. Work is also progressing with Statistics Austria on setting up a single information point to facilitate the re-use of protected public sector data.

In AI, Austria is strengthening its innovation ecosystem through initiatives aimed at facilitating access to advanced computing infrastructure and supporting experimentation with AI technologies. In this context, AI Factory Austria (AI:AT) is expected to play a key role by providing access to high-performance computing resources, technical expertise and proof-of-concept support for businesses and public authorities. The initiative aims to reduce barriers to entry for organisations wishing to develop or test AI applications by offering a combination of computing infrastructure, training programmes and expert support. Through collaboration with universities, innovation agencies and regional partners, the AI Factory is expected to contribute to the diffusion of AI technologies across sectors and regions.

Austria is also supporting the development of AI technologies through targeted research initiatives. The AI for Green programme has funded projects using AI to address environmental challenges and improve climate-related applications. From 2026 onwards, the programme is expected to shift its focus towards improving the resource efficiency of AI systems through research into 'Green AI'. In parallel, the AI for Tech initiative supports research into Hybrid AI, including neurosymbolic approaches aimed at improving the robustness and explainability of AI systems. New calls are planned for 2026 in both areas.

Austria also participates in collaborative European initiatives to support the adoption of AI technologies. The Interreg Europe project 'embrAIsme', led by the *Wirtschaftsservice* (Economic Service) (Amazon Web Services (aws)) and co-financed by the Federal Chancellery, aims to strengthen the policy framework supporting AI adoption by SMEs. The project focuses on improving access to finance, by addressing regulatory and skills barriers, and supporting collaboration networks to facilitate the integration of AI technologies into business processes.

Overall, Austria's policy approach focuses on improving the enabling conditions for the adoption of advanced technologies through stronger data governance frameworks, access to computing infrastructure and research support programmes. Ensuring that these initiatives translate into the widespread and productivity-enhancing adoption of advanced technologies across the economy remains a major challenge for the coming years.

2025 recommendation on the Cloud and data analytics: Introduce targeted support to accelerate the adoption of cloud and data analytics solutions, particularly among SMEs, to boost enterprise competitiveness.
Austria made some efforts to address the recommendation through new policy actions in 2025. In particular, it has taken steps to improve framework conditions for cloud and data analytics, in particular through the Data Access Act (DZG) and the implementation of the national data strategy, which aim to improve data availability and sharing. However, no major new targeted measures specifically supporting enterprise-level adoption – particularly among SMEs – have been introduced. Overall, further targeted support may be needed to accelerate adoption and boost competitiveness.

Unicorns, scale-ups and start-ups

Performance assessment

At the beginning of 2026, Austria had 4 unicorns (2030 national target of 10), which is the same number reported in 2025.

Policy context and assessment of recommendations

Austria continues to support the development of innovative start-ups and scale-ups through a combination of public equity instruments and new initiatives aimed at strengthening access to finance. In recent years, Austrian authorities have focused on improving the availability of risk capital and mobilising private investment in high-growth technology companies.

A key development is the planned Start-up and Scale-up Fund, announced as part of Austria's industrial strategy published in January 2026. The fund is expected to operate as a fund-of-funds model structured as an independently managed public-private partnership, focusing on investments in Austrian scale-ups. The Austrian government plans to contribute up to EUR 100 million, with a view to mobilising total investments in the range of EUR 300-500 million by attracting institutional investors such as pension funds and banks. According to national authorities, the fund is expected to start operations in 2027 and aims to address long-standing financing gaps in the scale-up phase of innovative companies.

In parallel, Austria continues to implement existing public equity programmes supporting innovative start-ups. In 2025, the spin-off initiative, implemented by the *Wirtschaftsservice* (aws), was launched to strengthen capital supply for technology-oriented start-ups originating from research institutions. The programme provides EUR 7 million in funding and complements existing aws equity instruments. Overall, Austrian public equity programmes have mobilised significant private investment: as of summer 2025, public investments of around EUR 180 million have supported 310 projects, mobilising approximately EUR 1.05 billion in private capital. Many of these investments have targeted priority technologies identified in Austria's industrial strategy, including AI, quantum technologies and green technologies.

Despite these initiatives, stakeholders said that the market environment for venture capital has remained cautious in recent years, affecting the emergence of unicorns and the organisation of large investment rounds. However, recent surveys suggest that venture capital activity may be gradually recovering, with better investment trends reported in 2025. Authorities expect that new policy instruments, including the upcoming Start-up and Scale-up Fund, could help improve the financing environment for high-growth companies and support the development of future unicorns in Austria.

2025 recommendation on Unicorns: scaling it further will be essential for Austria to fully realise its competitiveness and sovereignty goals within the Digital Decade.
In 2025, Austria continued the implementation of existing measures but did not take any new measure. It continues to support start-ups and scale-ups through public equity instruments and new initiatives, particularly the planned Startup and Scale-up Fund, expected to mobilise EUR 300-500 million. Existing programmes have also leveraged significant private investment. However, the number of unicorns remains unchanged at 4 in 2026, below the national target of 10. Investment conditions may be improving, but the impact of recent measures is yet to materialise.

Strengthening Cybersecurity & Resilience

Austrian enterprises perform relatively well compared to the EU average in the adoption of several cybersecurity measures, particularly those related to basic protection and network security. In 2024, Austria scored above the EU average in areas such as data backup (90.51% vs 79.23%), network access control (76.68% vs 65.43%), virtual private network (VPN) usage (63.64% vs 49.64%), and monitoring systems for detecting suspicious activity (65.90% vs 45.08%). It also performs above the EU average in encryption techniques (47.81% vs 39.72%) and slightly above the EU average in the use of combined authentication mechanisms (40.83% vs 39.84%).

However, gaps remain in more advanced or process-oriented cybersecurity practices. Austria lags slightly behind the EU average in ICT risk assessments (32.48% vs 34.10%) and ICT security tests (33.76% vs 34.64%), suggesting that while technical safeguards are widely implemented, more structured and proactive cybersecurity management practices are less developed. The use of strong password authentication is also marginally below the EU average (80.64% vs 83.69%), while biometric authentication is only slightly above (19.56% vs 18.27%).

Austria has recently introduced new legislative and institutional measures to strengthen the governance framework for cybersecurity and digital resilience. In December 2025, the Network and Information Systems (NIS) 2026 Act (NISG 2026) implementing the EU NIS2 Directive was published in the Federal Law Gazette. The law envisages the establishment of a Federal Office for Cybersecurity (*Bundesamt für Cybersicherheit*), directly subordinated to the Federal Ministry of the Interior, which is expected to become operational on 1 October 2026, when the act enters into force. The new structure aims to strengthen national cybersecurity coordination and the supervision of critical entities.

In parallel, broader governance and transparency frameworks relevant to digital resilience have been strengthened. Since September 2025, Austria's Information Freedom Act (*Informationsfreiheitsgesetz* – IFG) has abolished official secrecy and introduced a general right of access to public information. Public authorities are required to proactively publish information of general interest on the national open data portal data.gv.at. This has already led to the publication of numerous new datasets and increased platform usage. The measure is expected to strengthen transparency, improve data governance and reduce administrative burdens, while supporting greater trust in public institutions and facilitating the re-use of public sector information.

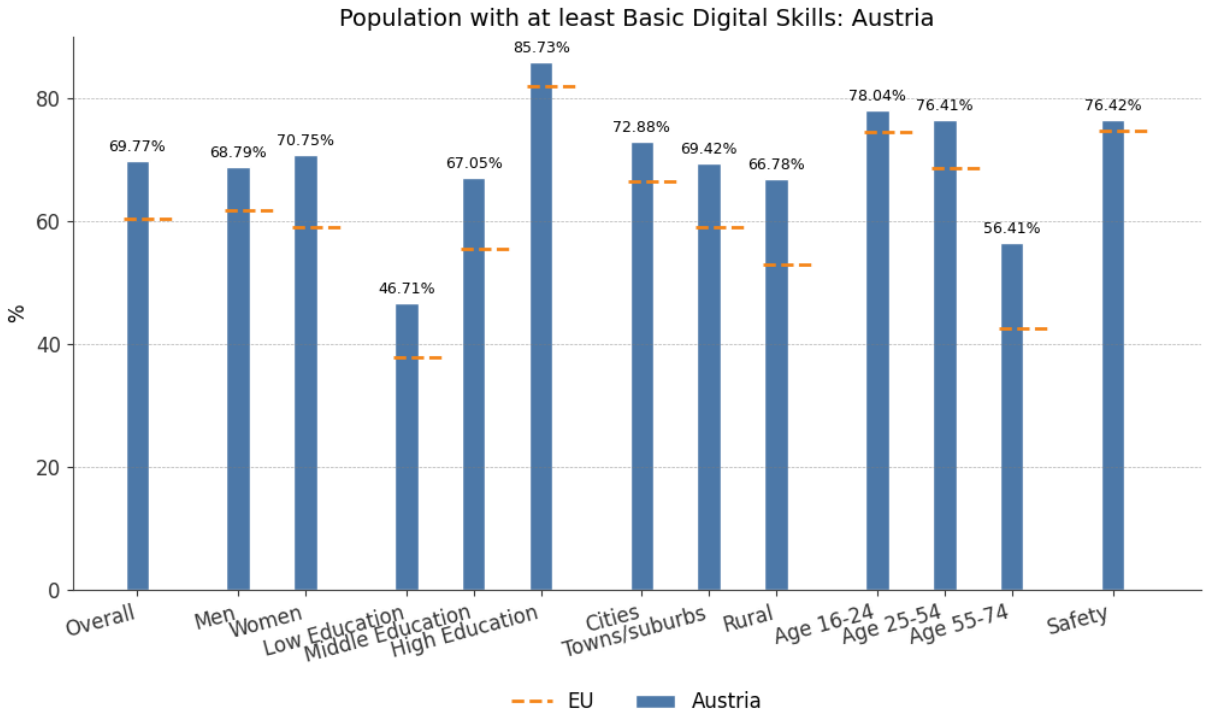
Protecting and empowering EU people and society

Empowering people and bringing the digital transformation closer to their needs

Equipping people with digital skills

Basic digital skills

Performance assessment



According to the Digital Decade Eurobarometer 2026, 70% of Austrian citizens think that the increasing digitalisation of public and private services is making their lives easier, while **24%** think it is making their lives more difficult.

Austria is at 69.77% of individuals aged 16-74 with at least basic digital skills after an increase of 3.9% annually since 2023, standing above the EU average of 60.39%. In 2023, Austria's figure was 64.68%, compared to the EU's 55.56%. While Austria's growth rate is slightly lower than the EU's 4.3%, it maintains a higher overall percentage of digitally skilled individuals.

Austria exhibits a gender gap of 1.96 percentage points in favour of women, with 70.75% of women and 68.79% of men possessing at least basic digital skills. This contrasts with the EU, which has a 2.74 percentage point gap in favour of men. Austria's gender gap is not only reversed but also smaller than the EU's, indicating a more balanced digital skills distribution between genders.

Austria

Austria's individuals with no or low formal education have a digital skills proficiency of 46.71%, which is higher than the EU's 37.56%. The gap between all individuals and those with low education in Austria is 23.06 percentage points, slightly larger than the EU's 22.83 percentage points.

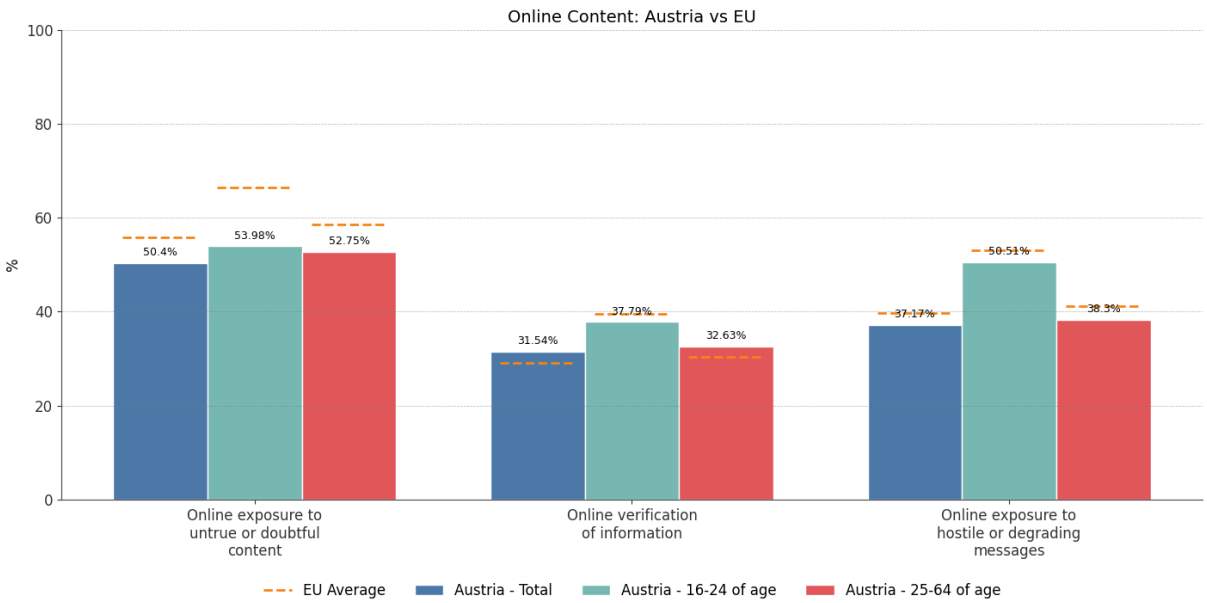
In rural areas of Austria, 66.78% of individuals have at least basic digital skills, which is substantially higher than the EU average of 52.83%. The gap between urban and rural areas in Austria is 6.1 percentage points, much smaller than the EU's 13.66 percentage points. This indicates a more evenly distributed digital skills landscape across different living areas in Austria.

Young adults aged 16 to 24 in Austria have a digital skills proficiency of 78.04%, surpassing the EU average of 74.53%. The older age group, 55 to 74, has a proficiency rate of 56.41%, which is also higher than the EU average of 42.6%. The gap between the youngest and oldest age groups in Austria is 21.63 percentage points, smaller than the EU's 31.93 percentage points, reflecting a more inclusive digital skills profile across generations.

In Austria, 76.42% of individuals have at least basic digital safety skills, slightly above the EU average of 74.63%.

In 2025, 39.42% of people in Austria used generative AI, which is higher than the EU average of 32.66%. Additionally, 21.2% of individuals in Austria used generative AI for professional purposes, compared to the EU average of 15.36%. This suggests that Austria is effectively integrating advanced digital tools into both personal and professional contexts. Based on the results of the Digital Decade **Eurobarometer 2026, the main barriers identified by Austrian citizens to using generative AI tools** are **concerns about privacy and protection of personal data (48%)**, concerns about **the accuracy of the output or receiving false information (44%)**, and **ethical concerns about the use of AI (43%).**

In summary, Austria's digital skills profile is characterised by a balanced gender distribution, strong performance among rural populations, and inclusive growth across age groups. While there is room for improvement in digital safety skills and among less-educated individuals, Austria's overall performance is robust, with targeted efforts needed to address specific gaps. The country's above-average adoption of generative AI also positions it well for future digital advancements.



Austria

Austria reached 50.4% of individuals exposed to untrue or doubtful content online in 2025, marking an increase of 8.8% annually since 2023, when the figure stood at 42.57%. This growth rate outpaces the EU average annual growth of 6.5%, though Austria's 2025 figure remains below the EU average of 55.9%. In 2023, Austria's exposure rate was also lower than the EU average of 49.25%. Focusing on age groups, 53.98% of individuals aged 16-24 were exposed to such content in 2025, compared to 52.75% of those aged 25-64. This reflects a modest gap of 1.23 pp favouring the younger age group, significantly smaller than the EU's 7.77 pp gap.

Austria is at 31.54% of individuals verifying the truthfulness of online content after an increase of 5.6% annually since 2023, when the figure was 28.26%. While Austria's growth rate lags behind the EU average annual growth of 9.6%, its 2025 figure exceeds the EU average of 29.16%. In 2023, Austria's verification rate of 28.26% was already higher than the EU average of 24.29%. Among age groups, 37.79% of individuals aged 16-24 verified online content in 2025, compared to 32.63% of those aged 25-64. This results in a gap of 5.16 pp in favour of the younger age group, smaller than the EU's 9.09 pp gap.

Austria reached 37.17% of individuals exposed to hostile or degrading messages online in 2025, reflecting an annual growth rate of 8.8% since 2023, when the figure was 31.4%. This growth rate is slightly below the EU average annual growth of 8.9%, and Austria's 2025 figure remains lower than the EU average of 39.72%. In 2023, Austria's exposure rate was also below the EU average of 33.5%. For individuals aged 16-24, the exposure rate in 2025 was 50.51%, compared to 38.3% for those aged 25-64. This creates a gap of 12.21 pp in favour of the younger age group, slightly larger than the EU's 11.85 pp gap.

According to the Digital Decade Eurobarometer 2026, the online issues having the biggest impact on Austrian citizens personally are **the misuse of personal data (55%)**, **fake news and disinformation (48%)**, and **insufficient protection of children and young people online (42%).**

Austria's data reveals several key trends in online content behaviour. While exposure to untrue or doubtful content and hostile messages is growing faster in Austria than in the EU on average, the country's figures remain below EU averages. Conversely, Austria outperforms the EU in the verification of online content, though its growth rate in this area is slower. Age-related disparities are evident, with younger individuals (16-24) consistently showing higher exposure rates and verification behaviours than older adults (25-64). However, the gaps between age groups in Austria are generally smaller than those observed at the EU level. These insights suggest that while Austria faces similar challenges to the broader EU, targeted interventions for younger individuals may be particularly effective in addressing online content issues.

Policy context and assessment of the recommendations

Austria continues to implement a broad set of initiatives aimed at improving digital skills across the population, building on the digital skills initiative coordinated by the Federal Chancellery. According to recent statistics, the share of the population with at least basic digital skills has continued to increase, approaching 70%. The current government programme focuses on further expanding digital skills across society, including increasing digital literacy and developing skills related to emerging technologies such as AI.

Recent initiatives place particular emphasis on improving digital skills through closer collaboration between public authorities, research institutions and the private sector. Under the digital skills

initiative, authorities have expanded cooperation with leading Austrian technology and telecommunications companies as well as firms from other sectors. Through a dedicated economic platform bringing together industry representatives, universities and research institutions, stakeholders are working together to develop new training programmes and learning opportunities aimed at strengthening digital skills across the workforce. This cooperation framework, launched at the end of 2025, aims to support the development of new digital training formats and courses responding to evolving technological needs.

Austria also launched the 'She goes AI' initiative in autumn 2025 as part of the broader Digital Skills Initiative and the AI Skills Action Plan. The initiative aims to improve the AI-related skills of women, promote female participation in AI-related careers and strengthen gender equality in the digital sector. It includes measures such as awareness-raising campaigns, targeted training programmes, scholarships for AI-related doctoral studies and the creation of a national network bringing together government, academia, businesses and civil society actors.

Overall, Austria's policy approach seeks to strengthen digital skills through coordinated action across the education system, research sector and labour market, with increasing attention being paid to emerging technologies such as AI and to improving gender balance in digital areas.

ICT specialists

Performance assessment

Austria was at 5.4% of ICT specialists in total employment after a progression of 1.9% in 2025 and stood above the EU average of 5.0%. The country performs comparatively well and remains slightly ahead of the EU average.

The share of women ICT specialists in Austria remains close to the EU average, but recent data point to a slight decline. **In 2025, 19.7% of ICT specialists in Austria were women**, compared with 21.1% in 2024. While Austria remains broadly aligned with the EU average, women continue to be significantly underrepresented in ICT occupations overall.

The country is lagging behind compared to its trajectory presented in the Digital Decade national roadmap.

Policy context and assessment of the recommendations

Austria has implemented several measures to increase the supply of ICT specialists, focusing on expanding higher education capacity, strengthening science, technology, engineering and maths (STEM) education and promoting specialised digital and AI-related training programmes. In the performance agreements with public universities for 2025-2027, Austria has allocated approximately EUR 4.4 billion (30.2% of the total EUR 14.5 billion budget) to the STEM sector. These resources support measures to increase enrolment in technical and ICT-related programmes, improve study conditions, reduce dropout rates, and create new degree programmes in areas such as AI, digital engineering and related digital areas.

Austria is also expanding its higher education infrastructure dedicated to digitalisation and emerging technologies. The Interdisciplinary Transformation University (IT:U) is one of the first public universities in Europe focused on digitalisation and digital transformation. It promotes interdisciplinary and project-based learning approaches and works closely with industry partners, enabling students to work on tackling real-world challenges in areas such as AI, robotics, cybersecurity and digital health. Since it was set up, IT:U has launched new doctoral and Master's programmes focused on interdisciplinary computing and digital technologies.

The Digital Innovation School, hosted at the Complexity Science Hub in Vienna, also contributes to developing highly specialised digital skills through a doctoral programme focusing on data-driven research and interdisciplinary problem solving. The programme, which started in 2024, trains researchers capable of applying advanced digital technologies to administration, business and society.

Austria is also strengthening the pipeline of ICT professionals through broader STEM initiatives. The 'Join in STEM – Action Plan for more STEM experts' initiative, launched in 2023, aims to increase the number of STEM graduates and improve gender balance in technical areas by 2030. The initiative promotes cooperation between education, research and industry actors through regional MINT (STEM) regions, which support projects designed to attract young people, particularly girls and women, to STEM education and careers. Through these combined measures, Austria aims to expand the pool of ICT specialists and strengthen the country's long-term innovation capacity.

2025 recommendation on ICT specialists: Accelerate the overall growth of ICT specialists by strengthening reskilling and upskilling initiatives and promoting ICT training across enterprises, while continuing efforts to close gender gaps.
Austria made some efforts to address the recommendation through new policy actions in 2025. In particular, it has taken steps to increase the supply of ICT specialists, particularly by expanding higher education capacity and improving STEM education. Substantial funding has been allocated to the STEM sector under the 2025-2027 university performance agreements, alongside the creation of new specialised programmes in areas such as AI and digital engineering. However, current measures focus predominantly on formal education and long-term talent pipelines, with a limited emphasis on reskilling and upskilling in companies. Strengthening continuous training and workforce adaptation in companies will be crucial for accelerating the increase in ICT specialists in line with the recommendation.

Key digital public services and solutions – trusted, user-friendly, and accessible to all

Performance assessment

In 2025, Austria's total digital public services score for citizens (which covers both national and cross-border users) reached 83.73/100 points. This represents a 3.6% increase compared to 2024. As such, Austria is below the EU average of 84.64/100 points. The country is on track according to its trajectory presented in the Digital Decade national roadmap.

When looking specifically at digital public services for national citizens, Austria reached 94.83/100 points in 2025. This is above the EU average of 94.01/100 points, and it marks a 0.1% decrease from 2024.

For cross-border digital public services for citizens, Austria's 2025 score was 72.62/100 points, which is below the EU average of 75.28/100 points. Compared to 2024, this reflects an 8.9% increase.

Citizen-related life events that score particularly well include Studying (100.0), Family (94.72), and Transport (93.75). Conversely, Starting a small claims procedure (60.0), Career (69.51), and Health (75.59) show the most room for improvement. Across levels of government for national citizens' digital public services, central government services scored 88.78/100 points, regional government services scored 76.07/100 points, and local government services scored 87.0/100 points.

Austria's total digital public services score for businesses (covering both national and cross-border businesses) was 88.8/100 points in 2025, standing above the EU average of 88.59/100 points.

This represents a 1.3% increase from 2024. The Business-related life event scoring particularly well is Business Start-Up (90.1), whereas Regular Business Operations (87.50) show the most room for improvement.

Notably, Austria's cross-border digital public services score for businesses reached 79.17/100 points in 2025, reflecting a 2.9% increase compared with 2024. These results are above the EU average of 78.37/100 points.

On the other hand, digital public services for businesses available to national users in Austria scored 98.44/100 points. This represents a no change since 2024 and places the country below the EU average of 98.81/100 points. The country is on track according to its trajectory presented in the Digital Decade national roadmap.

Across the two Digital Decade KPIs, Austria's Digital Public Services for Businesses indicator performs better than its counterpart for citizens.

This stronger performance is underpinned by digital public services for businesses available to national users, which forms the most mature component of the KPI, even as cross-border digital public services for businesses remains less developed. Recent progress has been driven primarily by improvements in cross-border digital public services for businesses, reflecting positive momentum across the KPI.

While life events such as Studying, Family, and Transport perform best, lower-scoring areas such as Starting a small claims procedure, Health, and Career do not yet exhibit the same level of maturity.

Overall, Digital Public Services for Citizens lag behind EU levels, while business-oriented services are comparatively closer to EU norms. A similar pattern appears across government tiers, where regional administrations are showing the greatest need for improvement. Despite these gaps, the underlying direction of change indicates Austria is on a positive upward trajectory toward achieving the 2030 digitalisation targets.

Austria's availability of eHealth records reaches a score of 89.06 in 2026, above the EU average of 86.51. The country is lagging behind compared to its trajectory presented in the Digital Decade national roadmap

Policy context and assessment of the recommendations

Austria continues to develop its digital identity ecosystem as a core enabler of digital public services. The national digital identity solution ID Austria provides secure authentication and electronic signature functionalities and is widely used to access public services online. Austria also has a wallet-like application, 'e-*Ausweise*', which enables citizens to store and present digital credentials such as driving licences, identity cards, vehicle registration documents ,age verification documents and student cards. Authorities are preparing the national legislative framework required for the deployment of the EU Digital Identity Wallet, with the objective of ensuring technical and organisational alignment between the existing national infrastructure and the European framework. Austria also considers itself a frontrunner in the area of certification and has developed a national certification scheme currently undergoing accreditation. Nevertheless, authorities have pointed out that the timeline for full implementation of the European wallet remains challenging given the number of delegated and implementing acts adopted at EU level and the limited availability of specialised technical expertise.

Austria continues to expand and modernise digital public services through coordinated efforts across ministries. Several sectoral initiatives aim to increase the availability and usability of digital services,

including the Justice 3.0 programme led by the Ministry of Justice, which seeks to further digitalise judicial procedures.

For businesses, the Austrian Business Service Portal (*Unternehmensserviceportal* – USP) remains the central access point for administrative services, providing a one-stop shop for interactions between companies and public authorities. The modernised E-Start-up service, launched in May 2025, enables companies to complete the entire incorporation process online. In 2025, 3 401 companies were founded digitally using the USP, representing around 10% of all company formations, and an increase of around 20% compared to 2024. Additional services introduced for the liberal professions have also significantly increased usage, with uptake among notaries, lawyers and tax advisers rising by nearly 90% between 2024 and 2025.

The digitalisation of administrative processes is also supported by the growing use of electronic delivery and data exchange systems. The *Mein Postkorb* (My Mailbox) electronic delivery service now enables secure digital communication between authorities, individuals and businesses. By 2025, approximately 2 800 authorities were using the system regularly, delivering around 1.3 million official documents electronically per month. User adoption has increased considerably, reaching around 1.6 million individuals and 700 000 companies. In parallel, Austria has made progress on implementing the once-only principle, particularly through the dadeX (Digital Austria Data Exchange) platform, which enables authorities to retrieve information directly from connected registers instead of requiring individuals and businesses to repeatedly submit documents. With 31 registers connected and 21 productive use cases, these systems are estimated to have generated administrative burden reductions of approximately EUR 204 million.

Despite this progress, several challenges remain. Fragmentation of data standards, legacy IT systems and dispersed operational responsibilities across levels of government continue to hinder interoperability and the full implementation of the once-only principle. Authorities have also pointed out that limited budgetary resources for upgrading core e-government infrastructures may constrain further development, as existing funding primarily supports the operation rather than the modernisation of key systems.

Austria continues to use its established e-health record system (ELGA) as the backbone of digital health services, enabling secure access to medical information such as prescriptions, discharge summaries and laboratory results. Digital health services are also accessible through national e-government authentication tools, including ID Austria, which facilitates secure access to patient portals and related services. While Austria maintains a relatively advanced digital health infrastructure compared to many EU countries, the use of digital health tools and services by the public is comparatively low. However, the further expansion and integration of digital health services depend on continued investments in interoperability, system upgrades and coordination across the healthcare system.

2025 recommendation on key digital public services: focus on accelerating growth in digital public services for citizens, particularly in cross-border services. Sustained efforts in digital public services for businesses are needed to maintain this positive momentum.
Austria continued the implementation of existing measures without introducing major new initiatives. Progress remains strong in digital public services for businesses, with increasing up-take and further administrative burden reductions. However, developments for individuals are more limited, particularly in cross-border services, where interoperability constraints and resource limitations continue to slow progress down. Sustained efforts will be needed to maintain momentum and address remaining structural challenges.

Leveraging digital transformation for a smart greening

The Austrian ICT sector's air emissions are relatively low, while the recycling of electronic equipment remains broadly in line with the EU average. Recent data show that the ICT sector emitted 17.1 kg CO_2 equivalent per capita, below the EU average of 22.8kg. The sector also represents a smaller share of total economy emissions (0.27% compared to 0.35% in the EU). A relatively higher share of emissions comes from ICT services' activities (33.4% vs 18.2% in the EU). At the same time, 79.11% of ICT-related waste collected (corresponding to two categories of waste electrical and electronic equipment) is recycled or prepared for re-use, slightly below the EU average of 80.23%.

According to the **Digital Decade Eurobarometer 2026, 54% of people in Austria believe that green digital technologies (such as energy-saving tech) will have the most positive impact in the next 10 years,** above the EU average of 50%

Austria promotes the integration of digital technologies into environmental and climate policies primarily through research and innovation programmes focusing on AI. The AI for Green programme has supported projects applying AI to climate-related challenges, funding 46 projects with over EUR 27 million. These initiatives aim to leverage AI technologies to improve environmental monitoring, energy efficiency and resource management.

From 2026 onwards, the programme is expected to focus more on 'Green AI', which seeks to improve the resource efficiency and environmental sustainability of AI systems themselves. A new call for tenders is planned for 2026, focusing on technological advances in applied research that reduce the energy consumption and computational footprint of AI models. These activities are part of Austria's broader efforts to ensure that the development and deployment of digital technologies contributes to the achievement of environmental sustainability objectives.

No additional measures have been introduced since the launch of the last national Digital Decade roadmap.

Annex I: National roadmap analysis

Austria's national Digital Decade strategic roadmap

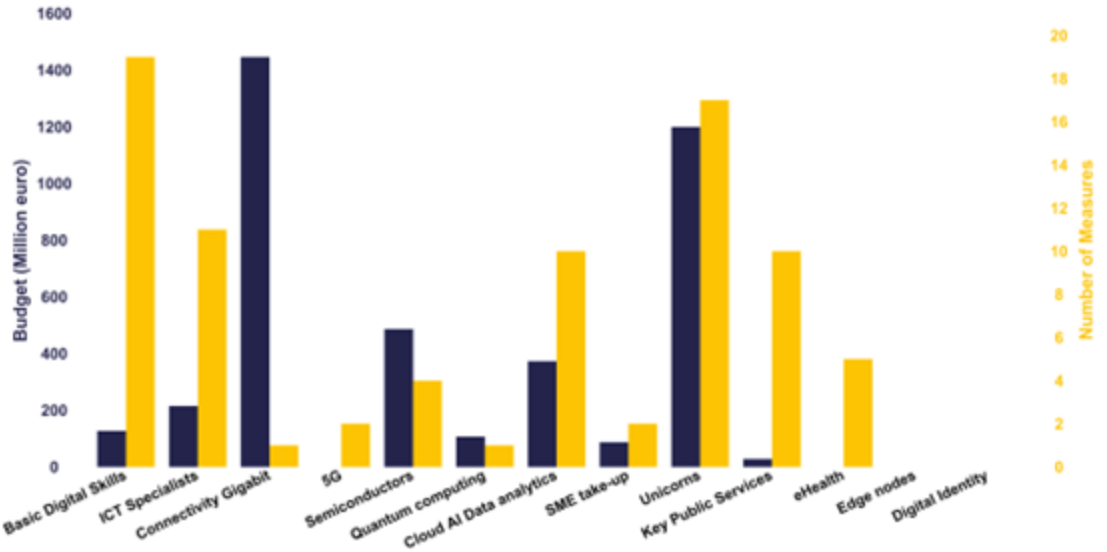
Austria provided a fully updated national Digital Decade roadmap on 31 January 2025, **containing 26 additional measures** and revising the trajectory for 5G. The update aligns with the new Commission's priorities on AI, cybersecurity and green ICT.

The new roadmap addresses a substantial number of roadmap recommendations issued in 2024, providing a trajectory for Basic Digital Skills, ICT Specialists, FTTP, Take-up of Data Analytics, Take-up of AI, Digital Intensity Index, Number of Unicorns, Digital Public Services for Citizens, Digital Public Services for Businesses, and the e-Health Index.

Notably, the roadmap also integrates strategic initiatives including Austria's national Data Strategy and e-Health Strategy, and links to cross-cutting goals such as accessibility and administrative digitalisation.

Several existing measures have been revised or expanded: most notably in the areas of semiconductors, cloud computing and AI, unicorns, and basic digital skills, to ensure more accurate budgetary allocations and stronger policy coherence. The update also includes specific adjustments in line with the EU digital rights and principles and the broader Digital Decade objectives.

Measures and budget in national roadmap[1]



A total of 85 measures are now part of Austria's national strategic roadmap, backed by EUR 4.07 billion in combined public and private investment (0.84% of Austria's GDP in 2024).

[1] When referring to national roadmaps, data used in this report are those declared by the Member States in their national roadmaps, on the basis of the Commission's guidance (C(2023) 4025 final). Data might reflect possible variations in reporting

Austria

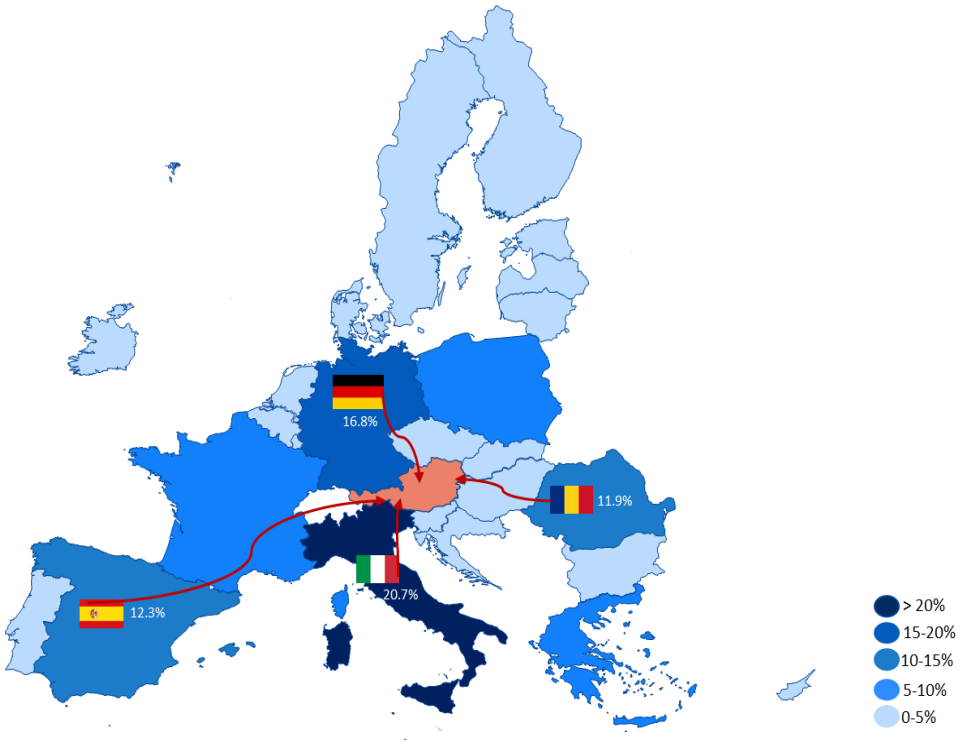
Overall, Austria's adjusted roadmap represents a comprehensive and ambitious update setting more precise national targets and introducing targeted new measures in critical areas such as AI, digital skills, and public service delivery. While implementation and coherence across some areas (e.g. green-digital nexus, uptake of advanced technologies by enterprises) could be further improved, the roadmap reflects a solid strategic effort to accelerate digital transformation in line with EU-wide goals.

Annex II: Funding, economic impacts & Multi-Country Projects

Country results from the study 'Assessing the Economic Impact of Digital Investments under the Recovery and Resilience Facility'

A modelling study conducted by the European Commission services, with the FIDELIO model, assesses the economic impact of the digital component of the RRF. As of November 2025, the digital part of the Recovery and Resilience Plan of Austria was evaluated to EUR 1.34 billion with EUR 688 million for digital infrastructures, EUR 373 million for digital skills, EUR 148 million for the digitalisation of businesses, EUR 117 million for the digitalisation of public services, and EUR 14 million for other digital priorities.

The total economic impact of RRF digital measures is estimated to EUR 5.31 billion for the national economy. Of this, EUR 3.41 billion stems from the direct effects of Austria's own RRP and EUR 1.91 billion corresponds to spillover effects from the implementation of other EU Member States' plans. Austria benefited the most from spillover effects from RRPs of Italy (EUR 0.39 billion), Germany (EUR 0.32 billion), Spain (EUR 0.23 billion). The most impacted sectors are Manufacturing (EUR 1.43 billion), Construction (EUR 0.83 billion), and Trade (EUR 0.54 billion).



RRF spillover effects to Austria

Austria

Funding from the Recovery and Resilience Facility (RRF) & Cohesion Policy

Austria allocates 35% of its total recovery and resilience plan to digital (EUR 1.3 billion)[2]. In addition, under cohesion policy, EUR 0.07 billion, representing 7% of the country's total cohesion policy funding, is dedicated to advancing Austria's digital transformation[3].

Multi-Country Projects

Austria is an observer to the Alliance for Language Technologies EDIC and is an observer to the Digital Commons EDIC, and a member of the consortium that aims to set up the EDIC in the area of cybersecurity skills. It is also supporting the setting up of the EDIC in the area of agri-food. Austria is a notifying Member State of the IPCEI on Microelectronics and Communication Technologies (IPCEI-ME/CT). Austria is a participating state of the EuroHPC Joint Undertaking (JU) and of the Chips JU.

[2] The share of financial allocations that contribute to digital objectives has been calculated using Annex VII to the Recovery and Resilience Facility Regulation. Last data update: 23 April 2026.

[3] This amount includes all investment specifically aimed at or substantially contributing to digital transformation in the 2021-2027 Cohesion policy programming period. The source funds are the European Regional Development Fund (including Interreg), the Cohesion Fund, the European Social Fund Plus, and the Just Transition Fund.