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PART 1/27

COMMISSION STAFF WORKING DOCUMENT

Digital Decade 2025 country reports

Accompanying the document

Communication from the Commission to the European Parliament, the Council and the European Economic and Social Committee and the Committee of the Regions

State of the Digital Decade 2025: Keep building the EU's sovereignty and digital future

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European Commission

DIGITAL DECADE 2025
COUNTRY REPORTS

Austria

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Executive summary

Austria continues to demonstrate strong momentum in AI adoption and to make progress on connectivity deployment, although the country still lags behind in the roll-out of Very High-Capacity Networks (VHCN) and Fibre to the Premises (FTTP), while the start-up ecosystem remains constrained by declining venture capital and limited unicorn growth. In 2024, Austria maintained solid performance in digital public services and has strengthened its role in strategic technologies, such as semiconductors and quantum technologies.

Austria shows a high level of ambition in its contribution to the Digital Decade having set 12 national targets, 92% of which are aligned with the EU 2030 targets. The country is following its trajectories well with 75% of them being on track (on the basis of the 2024 trajectories defined for 8 KPIs out of 8 analysed). Austria addressed 59% of the 12 recommendations issued by the Commission in 2024, either by implementing significant policy changes (17%) or making some changes (42%) through new measures.

Despite high levels of digital skills, persistent gaps across age and education exist. Sustainability is reflected in selective initiatives, but a coherent green-digital strategy is still lacking in the national Digital Decade roadmap. Overall, the level of commitment to digital transformation has remained consistent over time, as demonstrated by the adjusted national strategic roadmap, which reinforces the ambition across most areas of the Digital Decade framework. AI remains a strategic focus, with Austria's National AI Strategy representing the cornerstone of the country's efforts, supported by the adjusted roadmap's new initiatives.

Digital Decade KPI (1)	Austria				EU		Digital Decade target by 2030	
	DESI 2024 (year 2023)	DESI 2025 (year 2024)	Annual progress	National trajectory 2024 (3)	DESI 2025	Annual progress	AT	EU
Fixed Very High Capacity Network (VHCN) coverage	67.6%	72.2%	6.7%	73.0%	82.5%	4.9%	100.0%	100%
Fibre to the Premises (FTTP) coverage	41.0%	44.8%	9.4%	45.0%	69.2%	8.4%	72.0%	-
Overall 5G coverage	96.0%	99.5%	3.7%	99.5%	94.3%	5.9%	100.0%	100%
Edge Nodes (estimate)	18	33	83.3%	-	2257	90.5%	-	10000
SMEs with at least a basic level of digital intensity (2)	-	72.2%	3.6%	-	72.9%	2.8%	90.0%	90%
Cloud	35.6%	-	-	-	-	-	-	75%
Artificial Intelligence	10.8%	20.3%	87.9%	20.0%	13.5%	67.2%	75.0%	75%
Data analytics	23.9%	-	-	-	-	-	75.0%	75%
AI or Cloud or Data analytics	47.0%	-	-	-	-	-	-	75%
Unicorns	5	5	0.0%	4	286	4.4%	10	500
At least basic digital skills	64.7%	-	-	-	-	-	80.0%	80%
ICT specialists	5.3%	5.3%	0.0%	5.6%	5.0%	4.2%	10.0%	~10%
eID scheme notification		Yes						
Digital public services for citizens	80.7	80.8	0.1%	82.0	82.3	3.6%	100.0	100
Digital public services for businesses	82.9	87.7	5.8%	84.0	86.2	0.9%	100.0	100
Access to e-Health records	88.2	87.0	-1.4%	97.5	82.7	4.5%	100.0	100

(1) See the methodological note for the description of the indicators and other metrics
(2) DESI 2025 reports the version 4 of the Digital Intensity Index, that is comparable with the DII value from DESI 2023 (referring to year 2022) for the calculation of the annual progress. It is not comparable to the national trajectory that is based on version 3 of the index.
(3) National trajectory value if present in the national roadmap and if the indicator was measured in DESI2025 (year 2024)

According to the 2025 special Eurobarometer on the Digital Decade, 68% of Austrian citizens consider that the digitalisation of daily public and private services is making their lives easier. On the action of the public authorities, 87% consider it important to counter and mitigate the issue of fake news and disinformation online, and on competitiveness, 82% consider it important to ensure that European companies can grow and become 'European Champions' capable of competing globally.

A competitive, sovereign, and resilient EU based on technological leadership

Austria demonstrates strong 5G leadership, ongoing progress in AI adoption, and growing investment in strategic technologies such as semiconductors and quantum computing. With 99.55% 5G coverage and near-complete spectrum assignment, the country ranks among the EU's top performers in mobile connectivity. AI adoption by enterprises is accelerating and reached 20.3%, surpassing the EU average and supported by clear strategic direction and targeted funding. Austria's commitment to technological sovereignty is further reflected in its investments in strategic sectors: it continues to support quantum technologies through the Quantum Austria initiative and is advancing in semiconductors via targeted investments and participation in the Chips Joint Undertaking.

However, challenges remain in ensuring broader diffusion of advanced digital technologies. While Austria's digital intensity among SMEs is aligned with EU levels, the integration of data-driven solutions and next-generation technologies into business operations remains uneven. This is compounded by structural bottlenecks in the scale-up and start-up ecosystem, despite notable policy support. Venture capital investment has declined for the third consecutive year, as investor caution and delayed startup exits have slowed reinvestment cycles.

Protecting and empowering EU people and society

Austria has a strong performance in digital skills and continues to expand targeted measures to bridge structural gaps. However, persistent disparities, particularly across gender, education, and age affect digital inclusion. Flagship initiatives such as Digital Everywhere+ and the Future Skills programme demonstrate Austria's commitment to reaching disadvantaged groups and improving the digital capacity of its workforce. **Austria also took steps to expand its ICT workforce**, with new measures aimed at reskilling, increasing female participation, and strengthening STEM pathways.

Austria performs well in e-Health and digital public services, with new national targets, a dedicated strategy, and substantial funding.

Leveraging digital transformation for a smart greening

Austria recognises the importance of integrating environmental sustainability into its digital transition but lacks a coherent strategy explicitly twinning the green and digital dimensions. While AI for Green and SME-DIGITAL 4.0 initiatives support climate goals, no new measures have been adopted to monitor the environmental footprint of digital technologies or improve energy efficiency in infrastructures such as data centres.

National Digital Decade strategic roadmap

Austria submitted a fully updated roadmap in January 2025, including 26 new measures and revised trajectories for key KPIs such as 5G, AI, and digital public services. While it addresses most 2024 recommendations and sets clearer targets, the roadmap still lacks new dedicated support for SMEs and a strategic framework for the green-digital nexus. The overall ambition remains high, particularly

in skills, AI, and connectivity, though progress will depend on sustained investment and cross-sector coordination. A total of 85 measures are now part of Austria's national strategic roadmap with a total budget of EUR 4.07 billion (equivalent to 0.84% of Austria's GDP in 2024).

Funding & projects for digital

Austria allocates 36% of its total recovery and resilience plan to digital (EUR 1.3 billion)[1]. In addition, under cohesion policy, EUR 76 million, representing 7% of the country's total cohesion policy funding, is dedicated to advancing Austria's digital transformation[2].

Austria is directly involved in 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.

Austria has contributed to the Best Practice Accelerator[3] by sharing one best practice in the framework of the Digital Skills cluster (Digital Competence Initiative Austria).

Digital rights and principles

According to a support study, Austria has been one of the most active Member States in implementing the **European Declaration on Digital Rights and Principles**, with over 100 initiatives overall and 21 new initiatives launched in 2024. Austria is most active in the area of digital education, training and skills. Less activity has been identified with regards to Protection and empowerment of children and young people in the digital environment, and Sustainability. Measures in the area of Sustainability appear to have most impact on the ground, in contrast to those addressing safety, security and empowerment.

Recommendations:

- **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**.**
- **Cloud and data analytics**: Introduce targeted support to accelerate the adoption of cloud and data analytics solutions, particularly among SMEs, to boost enterprise competitiveness.
- **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.
- **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.
- **Unicorns:** scaling it further will be essential for Austria to fully realise its competitiveness and sovereignty goals within the Digital Decade.

[1] 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: 16 May 2025.
[2] 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, the Cohesion Fund, the European Social Fund Plus, and the Just Transition Fund.
[3] The Best Practice Accelerator (BPA) is a platform that enables Member States to share successful measures and challenges encountered in their efforts to meet their Digital Decade targets and objectives. Best practices are made available to Member States via the BPA Repository and showcased in regular workshops, currently focused on three thematic clusters: Digital Skills, Green IT, and the Uptake of Digital Technologies.

A competitive, sovereign and resilient EU based on technological leadership

Austria's digital competitiveness is increasingly recognised as a key driver of economic growth, with policies actively supporting the expansion of the country's digital ecosystem. In recent years, Austria has made notable progress in fostering innovation, particularly in the start-up landscape and in artificial intelligence (AI), with targeted investments in research, development, and innovation (R&D&I). However, while the government's commitment to digital transformation remains strong, the broader investment environment faces challenges due to declining venture capital flows and investor hesitancy.

The start-up ecosystem continues to face headwinds. As at the end of 2024, Austria had five unicorns, unchanged from 2023. This underlines the need for greater momentum to meet Austria's 2030 target of 10 unicorns. The adjusted roadmap outlines 17 measures contributing to this goal, supported by EUR 1.234 billion in public investment and EUR 628 million in private investment – an increase compared to the previous year. Among the newly introduced tools is the AWS Spin-off Initiative an EUR 8.5 million programme supporting VC access for university spin-offs.

Despite this support, Austria's VC environment remains strained: VC financing declined for the third consecutive year. Private investors remain cautious, with many focusing on existing portfolios, while delayed exits reduce reinvestment flows, weakening the scale-up ecosystem.

Austria's digital infrastructure shows a mixed performance. It lags behind the EU average in fibre to the premises (FTTP) and very high-capacity networks (VHCN) coverage despite robust growth rates, especially in rural areas. Conversely, Austria performs strongly in 5G deployment, with near-complete coverage (99.55%) and significantly higher spectrum assignment (99.17%) than the EU average. The country is generally on track to meet its national connectivity targets.

Deeper integration of data-driven and advanced digital technologies remains a key challenge for Austria's digital economy. Its cloud uptake and data analytics rates are growing but remain below the EU average, while AI adoption by companies is above average and accelerating rapidly. The digital intensity of SMEs is in line with the EU, with efforts underway to bridge structural gaps.

From a macroeconomic perspective, Austria's ICT sector contributes less to national value added than the EU average -– 3.83% in 2022 versus the EU's 5.46% -– indicating underutilised potential.[4] The sector accounts for 16.41% of business R&D expenditure (2021) and 18.42% of R&D personnel (2021), highlighting that while the innovation ecosystem is active, it remains relatively small in scale.

According to the **Special Eurobarometer on 'the Digital Decade' 2025[5], 82% of respondents in Austria** consider building efficient and secure digital infrastructures, including connectivity and data processing facilities, **an important priority for public authorities**. This is slightly **below the EU average of 86%**. Meanwhile, **11% of Austrians** viewed it as not important (compared to 9% at EU level).

[4] Most of the indicators mentioned in the country report are explained in the DESI 2025 Methodological Note accompanying the State of the Digital Decade report 2025

[5] Special Eurobarometer 566 on 'the Digital Decade' 2025: https://digital-strategy.ec.europa.eu/en/news-redirect/883227

Building technological leadership: digital infrastructure and technologies

Austria's digital infrastructure continues to advance steadily, with notable progress in 5G deployment and rural coverage expansion. While FTTP and VHCNs still lag behind EU averages, Austria's growth rates in these areas remain among the highest in the EU. The country's 5G roll-out is nearing full coverage, supported by effective spectrum management and regulatory incentives. Continued public and private investment will be essential to closing the remaining infrastructure gaps by 2030.

Connectivity infrastructure

Overall, Austria's performance closely aligns with its national trajectory for FTTP and VHCN coverage, showing strong growth rates but requiring further progress to close the gap with EU-level coverage.

Austria's total VHCN coverage for all households stood at 72.16% in 2024, still below the EU's 82.49%. However, Austria's growth rate of 6.7% outpaced the EU's 4.9%. For households in sparsely populated areas, Austria's VHCN coverage was 35.79% in 2023 and 42.17% in 2024, both lower than the EU's 55.59% and 61.89%, respectively. Austria's growth rate of 17.8% exceeded the EU's 11.3%.

Austria's total FTTP coverage stood at 44.82% in 2024, below the EU's 69.24%. However, Austria's growth rate of 9.4% was higher than the EU's 8.4%. For households in sparsely populated areas, Austria's FTTP coverage was 33.89% in 2024, lower than the EU's 58.78%. Austria's growth rate of 18.0% was higher than the EU's 11.9%.

Austria boasts an overall 5G coverage of 99.55% in 2024, higher than the EU's 94.35%, with a growth rate of 3.7% compared to the EU's 6.0%. For households in sparsely populated areas, Austria's 5G coverage was 82.03% in 2023 and 97.85% in 2024, both higher than the EU's 71.1% and 79.57%, respectively. Austria's growth rate of 19.3% was higher than the EU's 11.9%.

Regarding high-quality 5G, Austria's coverage in the 3.4-3.8 GHz band is better than the EU average with 83.97% achieved in 2024 (against 67.72% for the EU). However, Austria's growth rate of 6.2% was lower than the EU's 32.6%. For households in sparsely populated areas, Austria's 5G coverage in the 3.4-3.8 GHz band was 41.52% in 2023 and 51.85% in 2024, both higher than the EU's 15.86% and 26.19%, respectively. Austria's growth rate of 24.9% was lower than the EU's 65.1%.

Austria's 5G pioneer bands spectrum assignment was 99.17% in both 2024 and 2025, higher than the EU's 73.4% and 74.63%, respectively. Austria had no growth between 2024 and 2025, while the EU's growth was 1.7%. The country is on track according to its national trajectory for 5G.

Austria should focus on improving total VHCN and FTTP coverage to match EU averages. However, the country's strong performance in 5G coverage and spectrum assignment, along with positive growth rates in several areas, indicates a promising trajectory for digital infrastructure development.

VHCN and FTTP

Austria is at 72.16% of VHCN coverage (2030 national target 100%) after an increase of 6.7% in 2024 and stands below the EU average. In rural and sparsely populated areas, coverage remained limited, compared to the EU average. Despite this gap, Austria has shown strong momentum, with VHCN coverage growth outpacing the EU average.

Despite positive momentum, Austria still faces challenges. A slowdown in VHCN roll-out has become evident recently, mainly due to completion of upgrades from DOCSIS 3.0 and the limited existing

commitments to extend coverage to new households. Under the Broadband Austria initiatives (BBA2020 and BBA2030), however, Austria plans to deploy VHCN connectivity to an additional 160 000 households, reaching a total of at least 76% household coverage. Further opportunities to expand coverage have been identified by Austrian authorities, even though specific commitments remain lacking for approximately 440 000 households currently served by xDSL technology. Additionally, the implementation of the Gigabit Infrastructure Act (GIA) into national law is currently underway and is expected to contribute to accelerating fibre deployment.

Austria also needs to accelerate the pace of fibre roll-out. Despite recording a solid growth rate of 9.4% in 2024 – above the EU average – Austria's total FTTP coverage still lags significantly behind. The gap is even more pronounced in sparsely populated areas, where Austria's FTTP coverage (33.89%) remains far below the EU average (58.78%).

Regarding specific measures, the adjusted roadmap for 2024 did not introduce new measures for the Broadband Austria initiative. The primary funding instrument remains the Broadband Austria 2030 initiative (BBA2030), which will channel EUR 1.4 billion into deploying fibre infrastructure in rural areas.

In conclusion, Austria's unchanged targets for both fibre and VHCN remain realistic. However, while the country demonstrates robust growth, particularly in rural areas, further acceleration of fibre deployment is needed to close the coverage gap with the EU average. Achieving this will require sustained political commitment, continued investment, and targeted efforts in currently underserved regions.

5G

Austria is at 99.55% of 5G coverage (2030 national target 100%) after an increase of 3.7% in 2024 and stands above the EU average. Austria continues to aim for 100% 5G coverage by 2030, as established in its 2023 roadmap. Given Austria's current performance this goal aligns well with the EU Digital Decade targets.

The absence of public funding dedicated specifically to 5G deployment means that this target depends entirely on private-sector investment. Considering the already high coverage levels, achieving 100% coverage by 2030 appears realistic, though particular attention must be given to rural areas, where gaps are more challenging to close.

In the adjusted roadmap, Austria introduced only one new measure related to 5G, dedicated to anchoring the 5G Broadcast in the digitalisation concept. This measure aims to secure terrestrial television broadcasting coverage for approximately 98% of the Austrian population by reallocating multiplex platforms ('MUX A/B') by 2025. While the measure underscores the importance of 5G technology in broadcasting, it does not directly address mobile connectivity or improve rural broadband access. Thus, this measure is complementary but does not explicitly address recommendations from the 2024 country report concerning 5G standalone networks.

Deployment of 5G infrastructure remains robust due to regulatory obligations linked to spectrum auctions. Operators were required to deploy frequencies in the 3.4-3.8 GHz band at 1 000 mobile stations by the end of 2022, a target that was successfully met. Moreover, the multi-band auction for 700/1500/2100 MHz introduced by Austria's regulatory authority includes an innovative bonus system providing financial incentives for operators to extend coverage into rural areas. This has enabled 5G expansion in 1 702 cadastral communities, i.e. in approximately 80% of rural areas historically underserved by high-speed mobile connectivity.

Austria has shown exceptional progress in spectrum assignment for 5G, achieving a 99.2% assignment rate of 5G pioneer bands in 2023, positioning Austria among the EU's top performers. The 2022-2026 Spectrum Release Plan, published jointly by the regulatory authority and the Federal Ministry for Housing, Arts, Culture, Media and Sport, offers clear timelines for future spectrum assignments. Furthermore, the assignment of the 26 GHz band is expected to significantly improve capabilities, enabling innovative use-cases and supporting the development of edge computing applications.

2024 recommendation on connectivity infrastructure: Take appropriate actions to maintain the current sustained FTTP rollout pace and carefully monitor the metrics including rural coverage in order to reach full coverage by 2030; Ensure sufficient access of new players to spectrum for innovative business-to-business (B2B) and business-to-consumer (B2C) applications and encourage operators to speed up the deployment of 5G stand-alone core networks.

Austria made some efforts to address the recommendation through new policy actions in 2024. While Austria maintained a strong FTTP roll-out pace – especially in rural areas – and continued to make progress under the Broadband Austria 2030 initiative, no new measures were introduced beyond adjusted funding allocations. On 5G, Austria sustained strong deployment levels and spectrum assignment, but no new policies were adopted to accelerate standalone 5G networks or broaden spectrum access for new players, with efforts remaining anchored in the existing regulatory framework.

Semiconductors

Austria has positioned itself as an important player in the European semiconductor value chain, with a well-defined national strategy to support the sector. In the first version of the national roadmap, semiconductors received significant focus, with four key measures allocating approximately EUR 327 million, accounting for 9% of the strategic roadmap's total budget. Austria's approach aligns closely with the European Chips Act, which aims to enhance Europe's semiconductor production capacity, strengthen supply chain resilience, and reduce reliance on non-European manufacturers.

Since the last report, Austria has made notable progress in semiconductor manufacturing, particularly in wafer production for automotive, industrial, and medical applications. The country is home to key industry actors, including ams Osram, Infineon Austria, and AT&S, which contribute to both design and manufacturing capabilities. Austria's strength lies in specialised semiconductor production, particularly in power electronics, sensor technologies, and automotive applications.

The European Commission's approval of Austria's first Chips Act Pillar 2 project in February 2025 marked a significant milestone. The approved EUR 227 million State aid measure will support ams Osram AG in establishing a first-of-its-kind integrated wafer manufacturing facility in Premstätten. This plant will use Complementary Metal Oxide Semiconductors (CMOS) technology combined with Through Silicon Via (TSV) and optical filter techniques, offering Europe a high-reliability, automotive-grade semiconductor production capability.

This investment aligns with Austria's broader strategy to enhance supply chain security, improve technological sovereignty, and contribute to the EU's semiconductor ecosystem. The facility will be partially open to other semiconductor companies, increasing collaboration and ensuring a broader impact on the European semiconductor value chain.

Austria's strategic focus remains strong, and its commitments under the European Chips Act are being implemented effectively. Given the high level of ongoing investment, the lack of new national measures is justified.

Austria's semiconductor sector continues to expand, driven by strong public-private investment and a supportive regulatory framework. The ams Osram facility in Premstätten, expected to reach full operational capacity by 2030, will be the first of its kind in Europe to produce automotive-grade, highly integrated semiconductor chips. This development is key for Europe's strategic autonomy, reducing reliance on external suppliers and enhancing domestic semiconductor capabilities.

Edge nodes

Austria hosted 33 edge nodes in 2024, up from 30 in 2023, representing a growth of three units and accounting for 1.46% of the 2 257 edge nodes deployed across the EU. This share remains slightly below Austria's share of EU GDP, indicating underrepresentation in edge node deployment relative to its economic weight.

Progress remains slow due to insufficient attention to this aspect of digital infrastructure development. Similar to last year, Austria's adjusted national strategic roadmap for 2025 does not provide a defined national trajectory towards the EU Digital Decade goal of deploying 10 000 climate-neutral and secure edge nodes by 2030. Austria has also not introduced new dedicated measures specifically targeting edge nodes deployment or further incentivising private-sector investment in this field.

The Austrian authorities continue to rely on private-sector investors and, in particular, communications networks operators for the deployment of edge nodes. Public-sector intervention remains indirect, concentrating on creating favourable network conditions, facilitating the allocation of necessary spectrum resources – particularly through setting up the 26 GHz band – and implementing security and technical regulatory frameworks aligned with EU requirements such as the NIS2 Directive and related European standardisation efforts.

2024 recommendation on Edge nodes: Propose dedicated measures to support the deployment of edge nodes.
No information available on measures taken to address the recommendation. Austria has not communicated any measure to support the deployment of edge nodes across the country.

Quantum technologies

Austria continues to strategically position itself as a key European player in quantum technologies, particularly in quantum computing, simulation, communication infrastructure, and advanced quantum applications. Building on the foundations laid out in previous years, Austria maintains strong alignment with the EU-funded 'Quantum Austria' initiative, which remains the central pillar of its national strategy. Supported by EUR 107 million from the Recovery and Resilience Facility (RRF), the initiative has already funded 43 projects with EUR 78 million, reflecting Austria's sustained commitment to advancing research infrastructures, collaborative R&D, and the commercialisation of quantum-enabled solutions. These projects cover a wide range of areas including quantum computing, simulation, metrology, and communication.

Despite this continued momentum, the adjusted 2025 roadmap reflects a cautious approach, with no new quantum-specific measures introduced. Quantum Austria remains the sole dedicated initiative in this domain, and no further expansions or strategic amendments have been made since last year. Nonetheless, Austria continues to leverage broader support frameworks for deep-tech innovation. Programmes such as the aws First Incubator for KPI unicorns and aws PreSeed – Deep Tech contribute indirectly to Austria's quantum ecosystem by supporting start-ups and SMEs active in cutting-edge technology development.

At EU level, Austria remains actively involved in key initiatives underpinning the EU's technological sovereignty. It participates in three of the six pilot lines under the Chips Joint Undertaking – focusing on photonics, trapped ions, and diamonds – and continues to make progress in the development of a quantum communication infrastructure (QCI) as part of the EU's EuroQCI initiative, backed by the Digital Europe programme. These engagements underscore Austria's broader commitment to contributing meaningfully to Europe's quantum ambitions.

In parallel, Austria's selection as one of six new host countries for an AI Factory under the European High Performance Computing Joint Undertaking (EuroHPC JU) further enhances its innovation landscape. Austria's participation will support high-performance computing needs that are also crucial for developing and integrating quantum computing applications, reinforcing Austria's digital and scientific capabilities across interlinked domains.

Supporting EU-wide digital ecosystems and scaling up innovative enterprises

Austria's digitalisation of enterprises has steadily progressed, with 72.22% of SMEs reaching at least a basic level of digital intensity in 2024 – closely aligned with the EU average. While this marks a positive trajectory, sustained growth will be necessary to meet the 2030 Digital Decade target of 90%, particularly given the persistent digital gaps between SMEs and large firms in areas like cloud computing, data analytics, and AI adoption. In contrast to previous years, Austria's updated roadmap now includes a clear national target for SME digitalisation, reflecting stronger strategic alignment. However, implementation continues to rely largely on existing programmes such as SME.DIGITAL, with few new initiatives introduced. The start-up ecosystem, despite strong public support and ambitious policy targets, faces mounting investment headwinds, underscoring the need to maintain momentum and unlock scale-up potential.

SMEs with at least basic digital intensity

Austria is at 72.22% of SMEs with at least basic digital intensity (2030 national target: 90%) after a progression of **+4.86 percentage points since 2022 and** stands close to the EU average. In 2024, 72.22% of Austrian SMEs exhibited at least basic digital intensity, compared to the EU average of 72.91%. **Looking at higher levels, 34.47% of Austrian SMEs achieved high or very high digital intensity, slightly above the EU average of 32.66%.** The adjusted roadmap introduced for the first time a national target in this domain, signalling Austria's increased commitment to the Digital Decade.

The main measure underpinning Austria's SME digitalisation remains the SME.DIGITAL programme, now relaunched and expanded. Although the adjusted roadmap introduces no new measures explicitly targeting SMEs, Austrian authorities confirmed substantial investment and expectations for existing programmes (SME.DIGITAL and the European Digital Innovation Hubs) to significantly impact SME digital intensity. However, economic operators have indicated that the current financial allocation under SME.DIGITAL is insufficient and that increased awareness, higher investment volumes, and

enhanced training efforts – particularly in the areas of AI, data analytics, and green digital skills – are urgently needed.

While the fact that Austria has set a new national trajectory is a positive development, gaps persist regarding specific initiatives for data analytics uptake, which remains relatively low among Austrian SMEs.

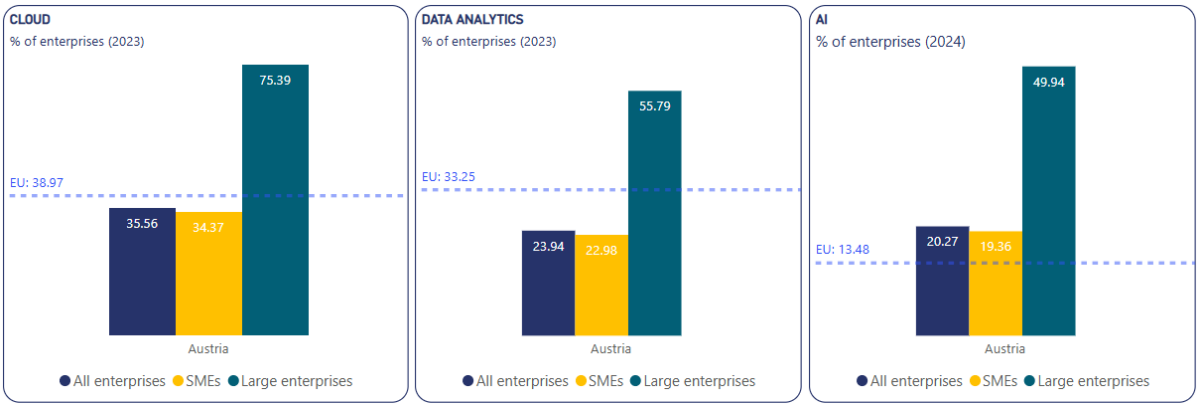
In 2024, Austria could rely on 11 European Digital Innovation Hubs, four of which receive support from the Digital Europe Programme. These hubs play an essential role in the digital transformation ecosystem, offering targeted local support to SMEs across various sectors. The following hubs deserve a special mention:

- AI5production: Promotes Industry 5.0 transitions, particularly through AI and cybersecurity.
- EDIH InnovATE: Accelerates digital transformation in agriculture, food, and energy sectors, focusing on rural competitiveness.
- Crowd in Motion: Supports and drives the digital transformation of organisations, with a focus on the tourism, sports and leisure industry, as well as the public sector.
- Applied CPS: Supports SMEs adopting Cyber-Physical Systems (CPS) for real-time operational management.

2024 recommendation on digitalisation of SMEs: Provide a clear strategy targeted at SMEs, proposing more ambitious dedicated support schemes to impulse new dynamics in their digitalisation.

In 2024, Austria continued the implementation of existing measures but did not take any new measure. The adjusted roadmap introduced a clearly defined national target for SME digital intensity and confirmed continued investment in SME.DIGITAL and the European Digital Innovation Hubs. However, no new initiatives were launched to expand subsidy schemes, and stakeholders noted current funding levels remain insufficient to meet evolving digital needs, particularly in areas like AI, data analytics, and green digital skills.

Take-up of cloud/AI/data analytics



The adoption of cloud computing, data analytics, and AI technologies in Austria fell behind the EU averages, particularly in data analytics, though AI adoption exceeded the EU level. A significant

disparity was observed between SMEs and large enterprises, with large enterprises showing considerably higher uptake across all technologies. Despite SMEs constituting the vast majority of enterprises with 10 or more employees and contributing a substantial share of the economy's value added, their lower adoption rates highlight a need for targeted support to foster broader digital transformation. Addressing this gap is crucial for enhancing the digital capabilities of Austrian SMEs and strengthening their competitive position in the economy.

The latest available data shows that cloud uptake in Austria reached 35.56% in 2023, falling short of the EU average of 38.97%. However, SMEs had an adoption rate of 34.37%, while 75.39% of large enterprises utilised cloud services. This resulted in a gap of 41.02 pp. in uptake between SMEs and large enterprises in Austria, which was higher than the EU gap of 31.68 pps.

In 2023, 23.94% of enterprises in Austria adopted data analytics, which is considerably lower than the EU average of 33.25%. Among SMEs, 22.98% used data analytics, compared to 55.79% of large enterprises. This indicates a gap of 32.81 pps between SMEs and large enterprises, which is lower than the EU gap of 39.72 pps.

Austria is at 20.27% of enterprises adopting AI (2030 national target in place) after a strong progression of +9.48 percentage points in 2024 and stands well above the EU average which stands at 13.48%. This represents a sharp increase from 10.79% in 2023, with an annual growth rate of 87.86%. AI uptake among SMEs reached 19.36%, while 49.94% of large enterprises reported adoption. The gap between SMEs and large enterprises (30.58 pps) is close to the EU average, indicating balanced adoption trends. Austria is on track with its national AI trajectory.

According to the latest available data (2023), **47.03% of enterprises in Austria engaged with AI technologies**, sophisticated or intermediate cloud computing services, or data analytics, trailing behind the EU average of 54.7%. More specifically, the uptake among SMEs was slightly lower at 45.9%, while large enterprises exhibited a notably higher rate of 84.77%. This indicates a percentage point difference of 38.87 in uptake between SMEs and large enterprises in Austria, which is higher than the EU gap of 32.97.

In 2022, Austrian SMEs produced 38.6% of the total value added in the economy, while large enterprises contributed 44.3%. Notably, SMEs made up about 97% of the enterprises with more than 10 employees, while large enterprises accounted for 3%.

- **Cloud**

Despite the growth opportunities identified, the adjusted roadmap for 2025 still does **not define a specific national target or trajectory** for cloud uptake by Austrian companies. Furthermore, no new measures explicitly dedicated to increasing cloud adoption have been introduced. Instead, Austria continues to rely primarily on existing initiatives, notably the establishment of the **Gaia-X Hub Austria**, to enhance interoperability and the dissemination, promotion and application of Gaia X concepts in specific use-cases. However, given the relatively limited scope and funding of the Gaia-X Hub, this measure alone remains insufficient to significantly accelerate cloud adoption and align with the ambitious EU target of **75% cloud uptake by 2030**.

The **SME.DIGITAL programme (KMU.DIGITAL)** represents an indirect yet important driver of cloud adoption. While the adjusted roadmap explicitly links KMU.DIGITAL to improving SME digital intensity, the initiatives also contribute significantly to enhancing cloud uptake through advisory services, digital skills training, and investment support tailored specifically for SMEs. To achieve notable increases in

cloud computing among SMEs, however, Austrian authorities would need to substantially expand this programme or introduce complementary initiatives specifically targeting cloud computing adoption.

Beyond the roadmap, Austrian authorities have not undertaken further measures contributing directly to the KPI of cloud uptake. Economic operators suggest the need for broader awareness-raising and targeted skills-building initiatives around cloud technology – this is considered critical given the significant gap between SMEs and large enterprises. Given the persistent challenges related to digital and technical skills shortages across Austria, investment in dedicated training programmes for SMEs could enhance cloud adoption rates.

Austria continues to exhibit growth potential in cloud adoption, but without additional targeted measures, clearly defined national targets, or expanded funding, achieving the EU's ambitious cloud uptake objectives by 2030 remains challenging.

2024 recommendation on Cloud uptake: Design specific measures to increase the take-up of advanced technologies by enterprises, especially for data analytics techniques and cloud; Stimulate the adoption of next generation cloud infrastructure and services by companies of all sizes, including by liaising with the Cloud IPCEI Exploitation office and/or the coordinators and the Member States participating in the IPCEI-CIS

In 2024 Austria continued the implementation of existing measures but did not take any new measure. The 2024 Digital Decade report emphasised Austria's strong growth dynamics but recommended setting explicit national targets and providing adequate financial support for cloud uptake, particularly among SMEs. Although the SME.DIGITAL programme contributes indirectly, the absence of targeted new measures or increased funding represents a missed opportunity. The unchanged approach signals that these recommendations have been only partially addressed.

- **Data Analytics**

In line with the recommendations of the 2024 Digital Decade report, the adjusted Austrian roadmap sets **a national trajectory and target for the uptake of data analytics uptake**, which is in line with the EU target.

The new **Data Strategy for Austria**, adopted in October 2024 through an extensive multi-stakeholder process, outlines a holistic vision for Austria's data economy. This strategy aims to develop sustainable data infrastructures, promote responsible data sharing, and establish an innovative data culture through **45 actionable measures**. Notably, the strategy includes improving public-sector dataset accessibility, promoting trusted data infrastructure investments, and creating a Data Stakeholder Forum to strengthen collaboration among data ecosystem actors. No dedicated funding has yet been allocated explicitly to this strategy, relying instead on existing ministerial resources and broader coordination efforts across federal ministries.

As part of the Austrian Data Strategy, the adjusted roadmap introduces a new measure dedicated to **data-driven innovation** aiming at promoting the national data economy and achieving sustainable development goals.

The adjusted roadmap also emphasises **the initiative on 'COMET centres and projects'**, funded with approximately **EUR 157 million** for 2024-2026. The 'COMET centres and projects' initiative aims to foster collaboration between enterprises and academia to drive product, process, and service innovation across sectors, with a particular emphasis on AI and data analytics. Notable centres under this initiative, such as the Hagenberg Software Competence Center and VRVis, Austria's leading visual computing organisation, play a vital role in fostering research and application of advanced digital technologies. Although COMET supports broad technological innovation rather than specifically targeting data analytics, its contribution to enhancing enterprise capabilities in advanced technologies, including data analytics, is substantial.

Moreover, the **SME.DIGITAL programme** has recently been explicitly linked to increasing data analytics uptake, providing SMEs with advisory services and support to integrate advanced data analytics solutions into their operations. However, given the persistently low adoption levels, further targeted initiatives or increased funding specifically focused on data analytics are recommended to accelerate progress.

The implementation of the Austrian Data Strategy is currently underway, focusing on enhancing public-sector data availability and promoting private-sector engagement through structured dialogue platforms. Its broad, adaptive approach positions Austria to react flexibly to market and technology developments.

Discussions with Austrian stakeholders indicate ongoing consultations with private-sector actors and the gradual ramp-up of data economy initiatives. In particular, the authorities have highlighted efforts to modernise data infrastructure within public administration, implement the Data Governance Act (DGA), and engage stakeholders through structured dialogue. Clearer prioritisation, dedicated funding, and specialised programmes focusing explicitly on enterprise-level analytics capabilities remain nonetheless necessary.

The 2024 report highlighted Austria's low adoption levels for data analytics and recommended targeted measures to significantly improve uptake among SMEs. While the Austrian authorities have set a national trajectory within the adjusted roadmap and established a comprehensive Data Strategy, dedicated measures explicitly targeting enterprise adoption of data analytics remain limited. The

COMET programme and **SME.DIGITAL** are valuable initiatives, yet additional targeted support and explicit investment would further reinforce the recommendations made in the previous year.

- **Artificial Intelligence**

The adjusted national roadmap now includes a clearly defined target and trajectory for AI uptake, fully aligned with the EU's Digital Decade ambition. Given Austria's current robust growth trajectory and substantial policy support, this national target appears realistic and achievable. The country is on track according to its national trajectory.

The adjusted roadmap introduces important organisational and structural innovations for measures related to AI uptake. Measures related to the promotion of digital technologies in the field of artificial intelligence and the promotion of digital technologies in the field of data-driven innovations, in particular, together account for a total budget of approximately EUR 170 million for the 2023-2026 period. This envelop also includes EUR 3.8 million of funding dedicated to the AI for Green initiative and EUR 4.8 million for AI for Tech, signalling Austria's commitment to deploying AI in support of environmental sustainability and tech development.

The AI for Green initiative specifically targets the use of AI to support climate and environmental objectives. Launched in 2021, it has supported 40 projects to date, with a total budget of around EUR 22.5 million. A fourth call for proposals was successfully conducted in 2024.

The previously mentioned COMET programme, presented in the adjusted national roadmap, is set to significantly contribute to Austria's AI capabilities with its budget of approximately EUR 157 million (2024-2026) by funding long-term research collaborations between businesses and academic institutions, thereby supporting innovation across sectors such as industry, health, mobility, and life sciences. **Around EUR 25 million of this funding is explicitly expected to be allocated to AI and other advanced digital technologies.**

Austria continues to actively promote a vibrant AI ecosystem beyond direct funding measures. The established AI Marketplace, supported by the Austrian promotional bank aws, connects AI solution providers with enterprises, encouraging collaboration and digital transformation. Initiatives like Digital Humanism further emphasise the ethical dimension of AI deployment, reflecting a comprehensive approach aligned with European values.

Additionally, Austria's participation in European initiatives, such as the recent selection by the EuroHPC JU to host an AI Factory, further strengthens national capabilities, providing critical infrastructure and expertise for scaling AI adoption, especially among SMEs.

Unicorns, scale-ups and start-ups

At the end of 2024, Austria had a total of five unicorns, showing no change compared to 2023. While this stable figure reflects a consistent level of high-performing start-ups, it also underscores the **need for further momentum in the scale-up of innovative companies to meet Austria's national target of reaching 10 unicorns by 2030, as set out in the adjusted roadmap**.

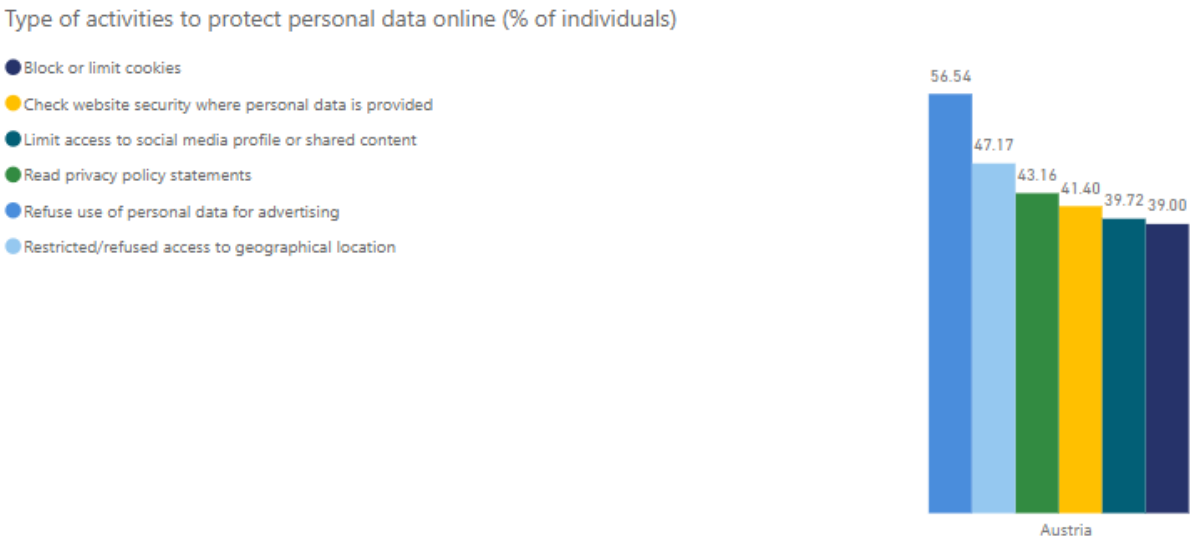
The adjusted roadmap mentions **17 measures contributing to this target**, backed by EUR 1.234 billion in public investment and EUR 628 million in private investment – a notable increase in private contributions compared to the previous roadmap. Among the newly introduced measures is the **aws Spin-off Initiative**, a EUR 8.5 million programme aimed at enhancing VC access for spin-offs through two components: support for building spin-off structures within universities, and direct financing for venture capitalists investing in spin-offs.

Despite these efforts, Austria's venture capital environment remains challenging. VC investments **continued to decline for the third consecutive year, with total VC financing reaching EUR 578 million in 2024**, down from EUR 695 million in 2023. The number of start-up financing rounds also fell from 184 to 149 over the same period. In 2023, VC investment in Austria amounted to just 0.022% of GDP, among the lowest in Europe. Investors, including business angels, have adopted a cautious approach, often focusing on supporting their existing portfolios rather than making new investments. Meanwhile, many start-ups are delaying exits in the hope of better valuations in the future, reducing reinvestment flows and contributing to stagnation in growth-stage financing.

Austria's business environment remains robust thanks to strong institutional support and a high level of public investment in entrepreneurship. However, challenges persist in attracting international investors and improving the overall competitiveness of the ecosystem. Continued progress on these fronts will be essential to unlocking Austria's unicorn potential and fulfilling its 2030 target.

Strengthening Cybersecurity & Resilience

In 2023, Austria continued to demonstrate strong individual cybersecurity awareness, **with 77.67% of individuals reporting that they took at least one step to protect their personal data online** – higher than the EU average of 69.55%. Notably, more than half (51.94%) of Austrians adopted three or more protective measures, indicating above-basic digital safety skills. Among specific measures, refusing the use of personal data for advertising purposes was most prevalent (56.54%), whereas changing browser settings to limit cookies remained less common (39%).



Based on the latest data (2024), **95.38% of Austrian enterprises had implemented some form of ICT security measure**, and **61.07% explicitly informed employees about cybersecurity obligations**.

In terms of technical standards deployment**, Austria remains below EU averages for IPv6 deployment**, with just **34.0% of end users** (EU average 36.0%) and 10.0% of servers (EU average 17.0%) adopting the standard since Q3 2024. Domain Name System Security Extensions (DNSSEC) is also an important standard to be rolled out as it introduces security features to DNS. In Austria, the DNSSEC validation rate (i.e. verification of the authenticity of responses sent by name servers to clients, using a digital signature technology) is 23% (Q3 2024), below the EU average of 47%.

The policy landscape experienced mixed developments during the past year. Austria has yet to implement the NIS2 Directive formally, after a legislative proposal was rejected by the Austrian Parliament in July 2024.

The adjusted national strategic roadmap introduces important refinements in Austria's cybersecurity policy. In particular, the measure on **Austria's Cybersecurity Research Funding Programme 'K-PASS'** represents an important policy innovation. K-PASS has already allocated approximately EUR 4.9 million to fund 10 research projects in its initial call, with an annual budget of EUR 5 million planned. The programme has no fixed end date but includes an assessment planned for 2027 to ensure alignment with EU cybersecurity research funding initiatives under the next Multiannual Financial Framework (MFF). Overall, a **total of EUR 35 million is planned for K-PASS by 2027**.

Austria also continues to address cybersecurity among SMEs through the Cybersecurity cheque 2023 measure. Originally more broadly defined, this initiative has now been specifically adapted to support

SME cybersecurity readiness, reflecting increased recognition of SME-specific cybersecurity vulnerabilities.

Austria has made considerable efforts to address cybersecurity specifically in the healthcare sector: **Austria established the Austrian Health CERT (AHC), which is a dedicated Computer Security Incident Response Team (CSIRT) for the healthcare sector**. Austrian authorities emphasise that the stringent liability rules under NIS2 will inherently boost compliance and cybersecurity standards across healthcare providers.

Austria has also fully implemented the EU 5G Cybersecurity Toolbox through legislative provisions within the national telecoms law.

The national cybersecurity strategy, originally introduced in 2021, is also expected to undergo a major update in line with the transposition of the NIS2 Directive. Comprehensive guidance on achieving national cybersecurity objectives, complementing EU regulatory frameworks, is expected in the near future.

According to the **2025 Eurobarometer**, **78% of Austrians** believe that improved cybersecurity, better protection of online data, and the safety of digital technologies would significantly facilitate their daily use of digital tools. This is slightly **below the EU average of 81%**. Meanwhile, **19% of respondents in Austria** did not consider it significant, compared to **16% at EU level**.

Protecting and empowering EU people and society

Empowering people and bringing the digital transformation closer to their needs

Austria's digital transformation strategy continues to place increasing emphasis on inclusiveness, with a growing number of targeted policy measures aiming to reduce socio-demographic divides in digital skills and access. While the country performs well overall, gender gaps remain substantial, particularly in both basic digital skills and ICT professions. Similarly, educational background continues to have a considerable influence on digital proficiency, with lower-skilled individuals significantly lagging behind. Austria addresses these disparities through a mix of national and regional initiatives, such as 'Digital Everywhere+', aimed at reaching rural populations and vulnerable groups, and the MINT Action Plan, designed to promote STEM education and participation among youth and women.

Austria has also begun integrating digital tools more strategically into public services, with a strong focus on usability and citizen trust. Measures in areas such as e-health and digital justice reflect an intention to make digital services more responsive to user needs. However, efforts to promote the uptake of secure digital identity solutions (eID) remain limited and will require additional focus. On the democracy and information front, Austria continues to enhance its response to disinformation through interministerial coordination, awareness-raising campaigns, and international cooperation. While digital safety for vulnerable groups such as children is not yet a central policy pillar, ongoing initiatives in schools and public campaigns aim to strengthen digital awareness from an early age.

According to the **2025 Eurobarometer**, **78% of Austrians** consider accessing public services online to be important for their daily life by 2030. This is **below the EU average of 84%**. At the same time, **21% of Austrian respondents** did not view it as important, compared to **14% at EU level**. When it comes to human support, **73% of Austrians believe that receiving human support to help access and use digital technologies and services would significantly facilitate their daily digital experience**, slightly below the EU average of 77%, while **87% of Austrians consider it important that public authorities ensure proper human support to accompany the transformation brought by digital technologies and services**, slightly below the EU average of 89%.

Equipping people with digital skills

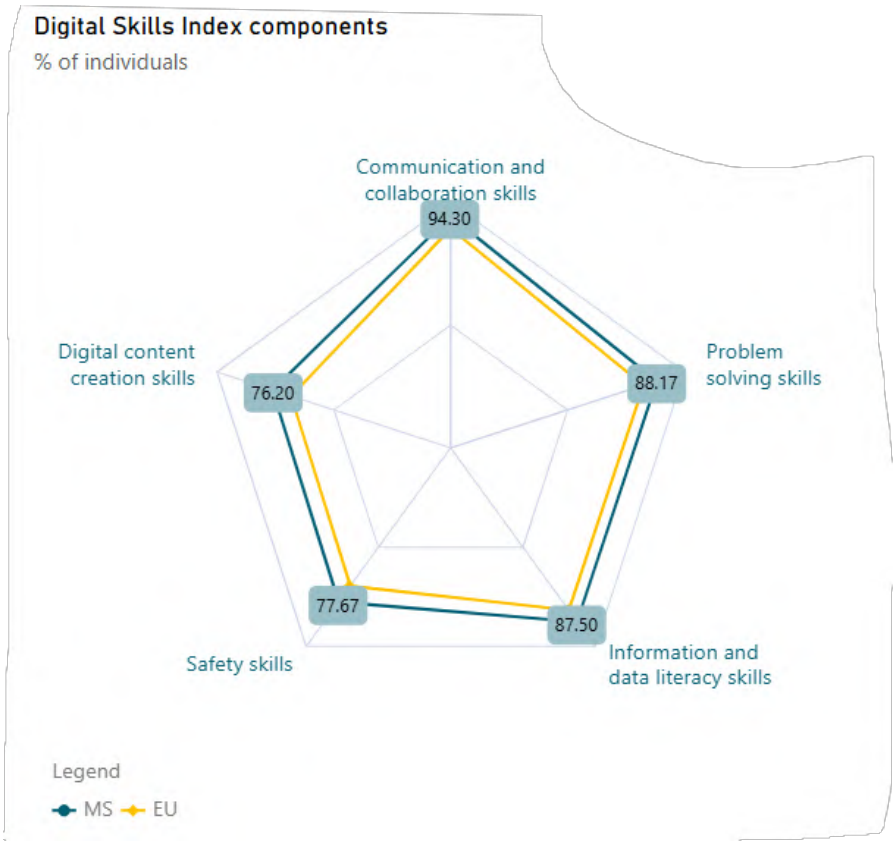
Basic Digital Skills

Austria maintains a strong position in digital skills, with 64.68% of its population possessing at least basic digital skills in 2023, well above the EU average of 55.56%. While new overall data is not available for 2024, detailed demographic insights highlight both strengths and areas requiring attention:

- **Gender Gap:** Austria faces the largest gender gap in the EU, with 68.71% of men and 60.67% of women proficient in digital skills – a disparity of 8.04 pps, significantly higher than the EU average (2.23 pps). Bridging this gender divide remains a key challenge.
- **Educational Attainment**: Highly educated Austrians exhibit high digital proficiency (83.06%), exceeding the EU average (79.83%). However, those with lower education levels remain

substantially behind at 37.17%, highlighting a considerable skills gap (27.51 pps below the national average), larger than the EU average (21.95 pps).

- **Urban-Rural Divide**: Rural residents have a lower rate (59.24%) compared to the national average but still surpass the EU rural average (47.50%). The digital divide between rural and national averages (5.44 pps) is smaller than the EU average (8.06 pps).



- **Age Group Analysis**: Individuals aged 35-44 have the highest proficiency (76.10%, significantly above the EU average of 65.26%). Although the 65-74 age group is the least proficient (37.68%), they are notably above their EU counterparts (28.19%).
- **Digital Skills Components**: Austria exceeds the EU average across all Digital Skills Index areas, notably excelling in communication and collaboration (94.30%). Digital content creation remains comparatively the weakest area (76.20%), yet still above the EU average.

Overall, Austria demonstrates robust digital skills performance but needs targeted measures to reduce disparities, especially regarding gender and educational background.

Austria initially set an ambitious national target to reach 100% basic digital skills coverage by 2030. However, **in 2024, following extensive stakeholder consultations, the authorities adjusted this goal to align with the EU target (80%).** This revision acknowledges realistic constraints such as structural challenges and certain demographic groups' resistance to full digitalisation.

The adjusted Austrian **roadmap introduced targeted measures designed to strengthen the country's progress towards achieving widespread basic digital skills**, reflecting both lessons learned from earlier initiatives and new priorities identified through extensive stakeholder consultation. These measures specifically address critical areas such as the use generative AI, vocational education, and public administration digitalisation:

- **Inter-University Project 'Academic AI Services' (EUR 6 million, 2025-2027)**: This initiative aims to establish a secure, controlled environment within universities to explore and integrate

generative AI technologies. By providing students and academic staff with direct exposure to advanced digital tools, the project supports not only the development of specialised digital skills but also contributes significantly to overall digital literacy within higher education.

- **Digi-Cheque for Trainees (2023-2024)**: Targeting vocational apprentices, this programme was designed to boost digital skills by fully funding participation in relevant training measures (up to EUR 500 per training course, for up to three training courses annually). Although this specific initiative has formally concluded, evaluation is currently underway, which will determine its future renewal and potential adjustments to better serve the changing needs of apprentices.
- **Future Skills initiative (EUR 900 000, 2025-2030)**: Recognising the urgent need for digital transformation within public services, this initiative identifies and develops essential digital competencies among employees in the Austrian federal administration. It aims to equip civil servants with the skills necessary to navigate and support ongoing digitalisation efforts effectively.

These new initiatives complement longstanding measures, such as the **Digital Skills Initiative**, which provides digital devices to approximately 80 000 students annually, and the systematic integration of digital education modules into primary and secondary curricula. Together, these coordinated efforts form the backbone of Austria's strategy to sustainably improve digital proficiency across all segments of society.

The 2024 report recommended targeted support for lower-skilled workers, disadvantaged groups, and rural populations, emphasising sustained financial backing and scaling up successful initiatives. The Austrian authorities responded by refining their strategy:

'Digital Everywhere+', an interministerial initiative, has proven particularly successful. Initially aimed at disadvantaged adult learners, rural residents, and those with a low level of education, it has shown promising results. This programme combines face-to-face workshops and online sessions, reaching digitally excluded groups effectively through partnerships with municipalities. About 50% of municipalities involved are in infrastructure-poor rural regions.

2024 recommendation on basic digital skills: Explore measures to boost the digital skills of the population that is far from digitalisation (such as low-skilled jobseekers) in order to achieve the very ambitious national target.
Austria addressed fully the recommendation by putting significant policy actions into place in 2024. Initiatives like '"Digital Everywhere+", combined with the continued implementation of existing measures such as "Digital Everywhere'" – both developed and implemented under the auspices of the cross-ministerial Digital Skills Initiative –Offensive', go in the direction of addressing the remaining challenges in the area of basic digital skills.

ICT specialists

In terms of ICT specialists, Austria outperforms the EU in the total percentage of ICT specialists as a share of total employment. In 2023, 5.3% of Austria's total employment were ICT specialists, compared to the EU's 4.8%. This figure remained steady at 5.3% in 2024, while the EU's share increased to 5.0%. **Austria's growth rate is thus of 0.0% in this area is lower than the EU's 4.2%.**

Regarding female ICT specialists, Austria shows a positive trend. In 2023, 19.5% of ICT specialists in Austria were female, slightly above the EU's 19.4%. This figure increased to 21.1% in 2024, while the EU's share increased to 19.5%. Austria's growth rate of 8.2% in this area is higher than the EU's 0.5%.

In 2022, 20.14% of Austrian enterprises with 10 or more employees provided ICT training, slightly below the EU's 22.37%. By 2024, this figure decreased to 19.92% in Austria, while the EU saw a marginal decrease to 22.29%. Austria's annual growth rate of -0.5% in this area is lower than the EU's -0.2%.

In summary, while Austria lags behind the EU in the proportion of enterprises providing ICT training and the growth rate of total ICT specialists, it shows a promising trend in increasing the share of female ICT specialists. The country's annual growth rate in this area is significantly higher than the EU's, indicating a positive trajectory towards gender balance in the ICT sector. However, Austria's overall ICT specialist growth rate is lower than the EU's, suggesting a need for strategies to boost the growth of ICT specialists in general. The country is lagging behind compared to its national trajectory.

To align with the EU's Digital Decade target of 10% ICT employment by 2030, Austria has now explicitly defined a national trajectory towards this objective in its adjusted roadmap.

The roadmap introduces **seven new measures specifically aimed at expanding the ICT workforce and addressing gender imbalances**. The IT Experts funding programme (EUR 1.2 million, 2025-2026) promotes innovative approaches to expand the ICT talent pool, with a particular emphasis on training, career orientation, and increasing the participation of women. A complementary initiative is the study on the labour market situation in the field of cybersecurity, funded through the K-PASS cybersecurity research programme, which will inform future policy through in-depth analysis of skills gaps, demand forecasts, and existing training offers.

To tackle gender-based barriers more directly, Austria has launched **multiple awareness and outreach campaigns, including the initiative on dismantling gender stereotypes in educational and career choices** (EUR 2.8 million, 2024-2026), **the MINT-Girls Challenge, and the Girl's Day in the federal public service**. These initiatives aim to make ICT and STEM careers more accessible and appealing to girls and young women. More broadly, the **MINT Action Plan** serves as a strategic umbrella for promoting STEM education across the entire training chain. It includes programmes such as MINT Regionen, which supports regional networking among educational institutions to promote STEM careers, with an emphasis on raising awareness and improving visibility for female students in technical fields.

Austrian authorities acknowledge that reaching the 10% target will require substantial efforts, particularly in closing the gap between current ICT workforce supply and the strong demand from industry. **Stakeholder feedback highlighted the need to go beyond attracting new entrants and focus on reskilling and upskilling existing professionals**, particularly for experienced roles.

2024 recommendation on ICT specialists: Based on the conclusion of the study on professionals in the Digital Skills Initiative, design new targeted measures to increase drastically the number of ICT specialists, including by upskilling/reskilling the labour force and bridging the gender gap.
Austria made some efforts to address the recommendation through new policy actions in 2024. Overall, the adjusted roadmap builds on previous foundations by providing a more complete framework, defining specific focus areas, and outlining a broader ambition to expand Austria's ICT

workforce through more inclusive measures. Continued monitoring of the effectiveness of these programmes, especially their gender impact, will be key to achieving the Digital Decade goals.

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

Austria reached a score of 80.82 in total digital public services for citizens in 2024 (2030 national target set), slightly below the EU average of 82.32. The annual growth rate was 0.1%, significantly lower than the EU's 3.6%. For cross-border digital public services for citizens, Austria's score fell from 68.22 in 2023 to 66.67 in 2024, remaining below the EU average of 71.28. The growth rate of -2.3% contrasts with the EU's +4.3%, signalling a need for renewed efforts to boost service availability and accessibility. The country is on track according to its national trajectory

In the realm of digital public services for businesses, Austria is on a more positive trajectory with a score of 87.69 exceeding the EU average of 86.23. Austria's growth rate of 5.8% outpaced the EU's 0.9%. For cross-border digital public services for businesses, Austria's score was 76.94 in 2024, above the EU's 73.76. Austria's growth rate of 12.2% was significantly higher than the EU's 0.9%. The country is on track according to its national trajectory.

Regarding access to e-health records, Austria's total score was 88.17 in 2023 and 86.98 in 2024, both higher than the EU's 79.12 and 82.70, respectively. However, Austria's growth rate of -1.4% was considerably lower than the EU's 4.5%. The country is lagging behind compared to its national trajectory.

Austria's digital public services and access to e-health records present a nuanced picture. While Austria leads in certain areas such as total digital public services for citizens in 2023 and access to e-health records in both years, it lags behind in others, particularly in cross-border services and growth rates. The country's performance in digital public services for businesses shows a promising development, with higher growth rates than the EU in both total and cross-border services.

eID

Austria continues to provide universal access to a secure digital identity (eID), which is fully notified under eIDAS. Consequently, the country has already met the Digital Decade's 2030 target, with 100% of its population having access to a secure, privacy-protecting digital identity solution.

The adjusted roadmap does not introduce new measures specifically targeting increased eID usage. However, Austrian authorities have indicated ongoing efforts to promote broader uptake through practical incentives and integration into daily life. Initiatives include linking the new eID Austria with passport issuance processes and offering fee reductions for public services when users identify themselves digitally. Such initiatives are expected to enhance the convenience and appeal of digital identities, ultimately encouraging more widespread adoption. Overall, the share of e-Government users within the population has only increased slightly, from 78.46% in 2022 to 78.71% in 2024.

Sustained promotional campaigns and integration of eID into essential public services will be crucial to increasing its everyday use, thus fully capitalising on Austria's strong foundation in digital identity infrastructure.

Digitalisation of public services for citizens and businesses

Following recommendations from the 2024 report, Austrian authorities addressed critical gaps in their strategic roadmap by setting explicit national targets and trajectories aligned with the EU's Digital Decade goals for both citizens and businesses. The adjusted roadmap streamlined previous

initiatives, narrowing its focus onto fewer, more impactful measures to accelerate overall progress in digital public service delivery.

The establishment of a jointly defined publicly accessible health portal, for instance, aims to create a comprehensive digital platform providing streamlined access to health-related services and information. At the same time, the digitalisation of case management in the judiciary constituted a step forward in fully digitalising Austria's judicial system: by transitioning to digital case management, the initiative seeks to significantly boost administrative efficiency, reduce processing times, and enhance transparency, thus providing citizens and businesses with easier and more accessible judicial services.

These targeted initiatives directly respond to previously identified challenges, notably by reinforcing coordination across government levels and improving the user experience in essential public sectors such as healthcare and judiciary services.

In the area of key digital public services for businesses, the topic of structured e-invoicing and Peppol integration has gained attention among economic operators in Austria. Peppol (Pan-European Public Procurement On-Line) is a set of technical specifications and a secure network infrastructure that facilitates the cross-border exchange of electronic procurement documents – most notably, structured electronic invoices – between public administrations and businesses across the EU. While e-invoicing to the federal government has been mandatory since 2014 – with the Peppol transport infrastructure accepted as a valid method for submission – Austria still lacks a designated national Peppol Authority, which places it behind most other EU Member States in this area. The Peppol system, operated by the non-profit organisation OpenPeppol, enables cross-border interoperability in electronic procurement and invoicing, and its effective implementation typically relies on coordination through a national authority. In Austria, although the Austrian Federal Computing Centre (BRZ) operates a centralised Service Metadata Publisher and supports approximately 5 000 Peppol receivers, it does not hold official Peppol Authority status. Economic stakeholders have voiced concern over this gap.

Authorities have notably prioritised overarching projects, emphasising coordinated implementation at federal and regional levels. The strategic reduction in the number of individual measures reflects a deliberate effort to focus resources effectively, thereby enhancing implementation and achieving clearer, measurable outcomes.

2024 recommendation on key digital public services: Promote the use of eID and digital public services by the citizens. Make use of the conclusions of the 'Study on appropriate channels for digitalisation with maximum benefits' to further digitalise public services in an efficient manner.
Austria made some efforts to address the recommendation through new policy actions in 2024. The adjusted roadmap introduced clear national targets and prioritised impactful flagship projects to improve service delivery. New measures in healthcare and justice aim to enhance user experience and accessibility. However, further action is needed to promote wider eID use.

e-Health

In 2024, Austria made significant progress to contribute to e-health Digital Decade commitments. While the key challenges identified in the 2024 country report persist, **Austria adopted a dedicated e-Health Strategy in June 2024**, reflected clearly in the adjusted national roadmap. The new strategy aims to address the challenges related to the **lack of integration for specific data categories** – such as

medical devices, implants, and medical imagery – **and incomplete connections within the ELGA system** (standing for 'Elektronische Gesundheitsakte', which means electronic health records), as it currently includes public hospitals and pharmacies, but excludes many private healthcare providers.

For the first time, **a defined national trajectory and explicit targets for e-health have been established, aligning closely with EU Digital Decade objectives**. In support of these goals, Austria has committed to an annual budget of approximately **EUR 51 million for e-health initiatives**, distributed through a yearly programme designed to implement specific projects prioritised under the new strategy.

By the same token, the new measures introduced in the adjusted roadmap significantly enhance Austria's e-health framework. The measure 'Access for citizens to all ELGA health records' expands both the accessibility and completeness of the existing ELGA platform, allowing citizens comprehensive digital access to their personal health records. This measure aligns closely with the establishment of the new publicly accessible health portal, which integrates various digital health services into a unified, user-friendly interface. The measure on '**Access for all healthcare providers (GDA)**' ensures comprehensive connectivity to Austria's public telematics infrastructure for healthcare professionals – including private providers. By addressing previously identified gaps in ELGA connectivity, particularly for private healthcare providers, and introducing mobile connectivity options, it significantly strengthens interoperability and communication within the healthcare ecosystem.

Finally, the introduction of the measure '**Data on medical devices and implants**' addresses a notable gap from previous years by integrating these critical data categories into the ELGA infrastructure. This addition substantially enhances the completeness of patient information available on the platform, thereby improving data availability, patient safety, and overall care coordination.

2024 recommendation on e-Health: (i) Make all data types available to citizens through the online access service; (ii) Offer a mobile application for citizens to access their electronic health records; (iii) Increase the supply of health data by onboarding more categories of healthcare providers.

Austria addressed fully the recommendation by putting significant policy actions into place in 2024. The majority of data categories, including medical devices and implants, are now being integrated into ELGA. A new publicly accessible health portal, including mobile access, is under development. Connectivity for private healthcare providers is being expanded. These measures are backed by a dedicated eHealth strategy and EUR 51 million in annual funding.

Building a safe and human centric digital environment and preserving our democracy

In recent years, Austria's digital civic and political participation rates have shown a moderate decline, yet generally remain aligned with or above EU averages**. In 2024, 11.30% of Austrians participated in online consultations or digital voting to define civic or political issues (down from 12.67% in 2023), still above the EU average of 10.05%.**

Similarly, **the percentage of individuals expressing opinions on civic or political matters through websites or social media decreased notably from 15.79% in 2023 to 12.39% in 2024**, now falling below the EU average of 16.48%. Overall civic or political participation dropped to 19.79% in 2024 (from 22.88% in 2023), slightly below the current EU average of 20.45%. These trends indicate a

weakening engagement that calls for renewed attention from policymakers, especially given Austria's traditionally strong digital infrastructure.

In 2023, in Austria, 31.4% of individuals encountered online messages considered hostile or degrading towards groups based on factors such as ethnicity or disability, slightly below the EU average of 33.5%. Young people (aged 16-24) (45.50%) reported much higher exposure than adults (aged between 25-64) (31.84%), showing a substantial age-related difference. Males (32.27%) and females (30.55%) reported similar rates, reflecting balanced exposure across genders.

In 2023, 42.57% of individuals in Austria reported having come across information or content on internet news sites or social media that they considered untrue or doubtful, below the EU average of 49.25%. Of those who encountered such content, 28.26% verified its truthfulness, indicating that a notable share of individuals assessed the reliability of the material. Youth (16-24) (48.70%) reported slightly more exposure than adults (25-64) (44.29%), with verification rates also being higher for youth (37.33%) compared to adults (28.93%). Similarly, males (47.25%) reported notably higher exposure than females (37.94%), with verification rates also being considerably higher among males (33.94%) than females (22.63%).

Compared to EU averages, a lower proportion of individuals in Austria encountered perceived hostile and degrading online messages and potentially misleading information online. At the same time, a higher proportion of individuals reported verifying the accuracy of information compared to the EU average, though notable differences in exposure and verification rates existed between males and females, as well as between young people (16-24) and adults (25-64). Overall, while the data shows a relatively more positive picture for Austria than broader EU trends, efforts are still needed to ensure the safety and inclusiveness of online spaces, with a focus on countering misinformation.

Austrian authorities have taken targeted and comprehensive measures to address rising concerns about disinformation, particularly around major electoral events. Austria employs a robust interministerial approach, exemplified by **the Interministerial Working Group on Hybrid Threats, established in 2019**, aimed at coordinating national strategies to counter disinformation effectively and enhancing resilience through regular assessment and inter-agency communication.

Strategically, Austria's approach involves both preventive and responsive measures. Prior to the 2024 elections, authorities implemented dedicated initiatives such as the social media campaign 'Combating disinformation' to raise public awareness and resilience. Furthermore, the government launched targeted awareness campaigns for municipalities to enhance vigilance against misinformation in local elections. Regular training and information sessions, including online and classroom-based courses for public administration staff, contribute to broader societal awareness.

On an operational level, Austrian authorities utilise the Federal Criminal Police Information Service on Disinformation, which provides daily analyses and operational measures through interministerial platforms, significantly enhancing preparedness against coordinated disinformation campaigns. The strategic communication response to Foreign Information Manipulation and Interference (FIMI) is bolstered by continuous research, notably via the national security research programmes (KIRAS and K-PASS).

Austria has demonstrated successful pragmatic cooperation among ministries and institutions, particularly evident during cyber threats. Nonetheless, authorities highlight that sustained long-term investment in resilience-building measures, digital literacy, and public trust is indispensable to effectively counter the evolving landscape of disinformation.

Overall, Austria maintains a relatively favourable digital environment, exhibiting slightly lower rates of hostile and misleading content exposure compared to broader EU trends. Yet, declining civic participation online signals the need for renewed policy focus on digital civic engagement. The authorities' comprehensive, interministerial approach to combating disinformation provides a robust framework, but sustained efforts remain crucial to further strengthen resilience, build digital awareness across demographics, and maintain Austria's democratic integrity in the digital age.

According to the **2025 Eurobarometer**, **Austrian respondents express a very high sense of urgency** for public authorities to act in protecting children online, mirroring the EU average. Specifically, **93%** of Austrians consider urgent action necessary to address **the negative impact of social media on children's mental health**, identical to the EU average, while **92%** find it urgent to tackle **cyberbullying and online harassment,** and**92%** support urgent action on **age assurance mechanisms to restrict access to age-inappropriate content**, again equal to the EU average.

At the same time, **79% of Austrians consider it important that public authorities take action to shape the development of Artificial Intelligence and other digital technologies to ensure they respect fundamental rights and values**, slightly below the EU average of 83%.

Leveraging digital transformation for a smart greening

Austrian authorities recognise the importance of the green transition and consistently prioritises sustainability in their broader political and economic agenda. However, **the integration of environmental objectives within the country's digital strategic roadmap remains limited.** While certain initiatives – such as those promoting AI for environmental purposes – contribute indirectly to climate goals, the roadmap lacks a comprehensive approach to harness digital tools for sustainability. As a result, the green-digital nexus is not yet fully embedded in Austria's digital transformation strategy, suggesting scope for a more strategic alignment moving forward.

The environmental footprint of Austria's ICT sector reveals a positive trend. Austria's recycling rates for outdated ICT devices consistently exceed EU averages, indicating higher device turnover. Specifically, for older desktop computers (18.05%), mobile phones (14.69%), and laptops or tablets (14.50%), Austria surpasses EU average disposal rates (14.66%, 10.93%, and 11.31% respectively).

Austrians notably prioritise sustainability when purchasing ICT devices. Only 1.80% of Austrian consumers report that they consider none of the sustainability characteristics important, substantially below the EU average (3.65%). Moreover, Austrian consumers exhibit strong environmental awareness regarding product lifecycle management: 20.88% consider the availability of a manufacturer or seller take-back scheme as important, markedly higher than the EU average (6.85%). Price remains a decisive factor for most consumers (71.43%), slightly higher than the EU average (69.12%).

The adjusted Austrian roadmap continues to lack a dedicated, explicit green digital transition section, although several initiatives indirectly support sustainability objectives. Existing measures, such as 'AI for Green', continue to drive progress by funding AI applications explicitly designed to achieve environmental and climate goals. The programme emphasises assessing the climate-related costs versus the environmental benefits of new AI applications, thus embedding sustainability directly within digital innovation processes.

Furthermore, **the SME-DIGITAL 4.0 & GREEN support initiative remains active, promoting the digital transformation of SMEs with a sustainability focus.** However, no significant new measures or innovations specifically addressing the environmental footprint of the ICT sector have been introduced.

Austrian authorities highlighted proactive steps towards greater sustainability awareness in digital technologies. In particular, the recent call 'AI Ökosysteme 2024' includes a funded research study on Green AI, with a budget of up to EUR 100 000 for 18 months. This study systematically evaluates current research on sustainable AI systems and aims to provide practical guidelines for developers and policymakers, facilitating broader adoption of less resource-intensive AI technologies, such as renewable-powered infrastructure and computationally efficient algorithms.

Additionally, sustainability and climate neutrality form core cross-cutting themes within the 2024-2026 AI Implementation Plan of the national AI strategy (AIM AT 2030), underlining Austria's intent to embed environmental considerations deep into its broader AI and digital strategies.

According to the 2025 Eurobarometer, **69% of Austrians believe that digital technologies will be important in helping to fight climate change by 2030**, such as through apps that track emissions or enable car-sharing and online meetings. This figure is slightly below the EU average of 74%. Similarly, **76% of Austrians consider it important that public authorities ensure digital technologies serve the green transition**, compared to an EU average of 80%.

2024 recommendation on Leveraging digital transformation for a smart greening: (i) Develop a coherent approach to twinning the digital and green transitions. First, promote improvements in energy and material efficiency of digital infrastructures, in particular data centres. (ii) Second, support the development and deployment of digital solutions that reduce the carbon footprint in other sectors, such as energy, transport, buildings, and agriculture, including the uptake of such solutions by SMEs. (iii) Monitor and quantify the emission reductions of the deployed digital solutions in line with the relevant EU guidance and with the support of the methodology developed by the European Green Digital Coalition, in view of future policy development, as well as of attracting relevant financing

In 2024, Austria continued the implementation of existing measures but did not take any new measuremeasures. Austria recognises the importance of aligning digital transformation with environmental objectives, but progress remains fragmented. The adjusted roadmap continues to lack a dedicated section or coherent strategy linking the green and digital transitions. While initiatives such as AI for Green and SME-DIGITAL 4.0 & GREEN support sustainability goals indirectly - by promoting resource-efficient AI solutions and green SME transformation - no new or comprehensive measures have been taken to improve the energy or material efficiency of digital infrastructures, particularly data centres.

Austria has also not yet introduced mechanisms to monitor or quantify the environmental impact of digital technologies. However, ongoing initiatives, such as the Green AI study under the "'AI Ökosysteme 2024"2024' call and cross-cutting sustainability themes in the 2024-2026 AI Implementation Plan 2024–2026, reflect growing awareness and could lay the groundwork for future policy alignment.

Annex I – National roadmap analysis

Austria's national Digital Decade strategic roadmap

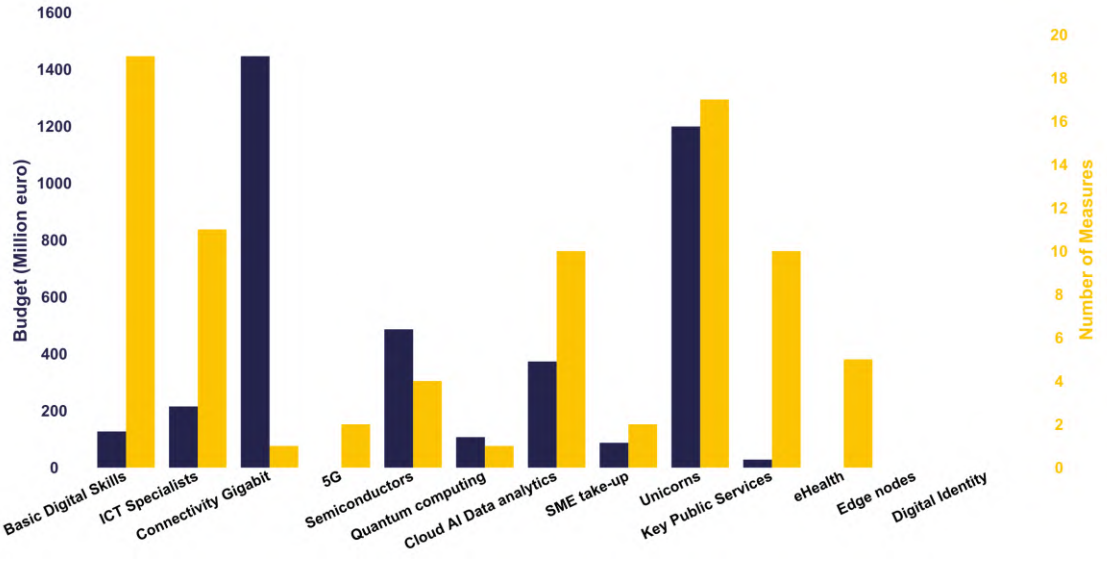
Austria provided a fully updated national Digital Decade roadmap on 31 January 2025, **containing 26 additional measures** and revising the trajectory for 5G. The update aligns with the new Commission's priorities on AI, cybersecurity and green ICT.

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[6]



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).

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

[6] 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 practices and methodological choices across Member States. No systematic assessment of the extent to which Member States followed the guidance was carried out.

improved, the roadmap reflects a solid strategic effort to accelerate digital transformation in line with EU-wide goals.

Annex II – Factsheet on multi-country projects (MCPs) and funding

Multi-country projects and best practices

Austria participates as an observer in the Alliance for Language Technologies EDIC, and is supporting the setting up of some EDICs in the making, e.g. in the area of cybersecurity skills. It participates directly in 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.

Austria has contributed to the Best Practice Accelerator by sharing one best practice in the framework of the Digital Skills cluster (Digital Skills Initiative Austria).

EU funding for digital policies in Austria

Austria allocates 36% of its total recovery and resilience plan to digital (EUR 1.3 billion)[7]. In addition, under cohesion policy, EUR 76 million (representing 7% of the country's total cohesion policy funding), is dedicated to advancing Austria's digital transformation[8]. According to JRC estimates, EUR 1.4 billion directly contribute to achieving Digital Decade targets (of which EUR 1.3 billion comes from the RRF and EUR 68 million from cohesion policy funding)[9].Investments are strongly concentrated in a few key areas. Gigabit capable network deployment receives the highest allocation, underlining Austria's focus on improving its digital infrastructure. Basic digital skills and the training of ICT specialists are also well-funded, reflecting the country's efforts to enhance human capital in the digital domain.

Significant resources are dedicated to emerging technologies, with over EUR 100 million each for semiconductors and quantum computing, aligning with the strong priority given to these areas in the Country's national strategic roadmap.

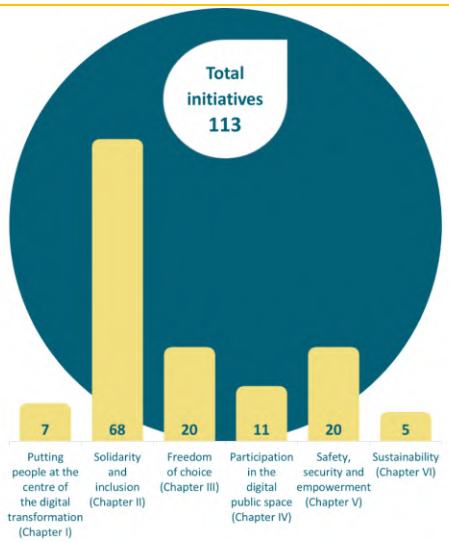
Overall, Austria's funding approach highlights a strategic emphasis on connectivity, digital skills, and technological innovation.

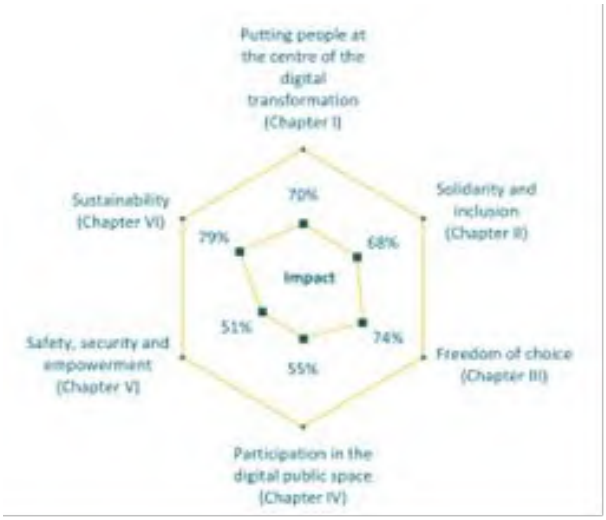
[7] The share of financial allocations that contribute to digital objectives has been calculated using Annex VII to the Recovery and Resilience Facility Regulation. Last data update: 16 May 2025.

[8] 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, the Cohesion Fund, the European Social Fund Plus, and the Just Transition Fund.

[9] Joint Research Centre, Nepelski, D. and Torrecillas, J. Mapping EU level funding instruments 2021-2027 to Digital Decade targets – 2025 update, Publications Office of the European Union, Luxembourg, 2025, JRC141966. Last data update: 10 March 2025.

Annex III – Digital Rights and Principles[10]





Activity on Digital Rights and Principles (figure 1)

Austria has been one of the most active Member States in implementing digital rights and principles, with over 100 initiatives overall and 21 new initiatives in 2024, showing significant progress towards its commitments. **Austria is most active in the area of Digital education, training and skills** (II). There is room for improvement, especially with regards to Protection and empowerment of children and young people in the digital environment (V) and Sustainability (VI) where less activity has been identified.

Impact of Digital Rights Initiatives (figure 2)

Quantitative impact indicators developed by the support study illustrate the level of implementation of digital rights initiatives on the ground. Based on available data, they estimate the impact of measures implemented by key stakeholders in Austria (mainly national government) and how these are perceived by citizens.

The indicators suggest that **Austria is most successful in implementing commitments related to Sustainability** (VI). Austria should review and strengthen efforts in areas where the impact of digital rights initiatives appears to be limited despite relative activity, notably on Safety, security and empowerment (V).

According to the Special Eurobarometer 'Digital Decade 2025', **53% of citizens in Austria think that the EU protects their digital rights well** (a 2% decrease since 2024). This is above the EU average of 44%. Citizens are particularly confident about getting easy online access to all key public services in the EU (65%, above the EU average of 58%). They are most worried that their right to a safe digital

[10] Based on a study to support the Monitoring of the Implementation of the Declaration on Digital Rights and Principles, available here. For a more detailed country factsheet accompanying the study, click here.

environment and content for children and young people is not well protected (49%, below the EU average of 48%).