

2024 UPDATE

# Digital Decade: The Austrian Way

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Digital Decade Targets

# Digital Decade Targets

→ Through the Digital Decade Policy Programme, the European Union aims to significantly advance digital transformation across Europe throughout the 2020s. The key objectives are:

- A digitally skilled population and highly skilled digital professionals
- Secure and sustainable digital infrastructure
- Successful digital transformation of companies
- Digitalisation of public services

With the “Digital Compass 2030”, the European Union has mapped out the “Path to the Digital Decade”. The Digital Compass sets out the main common objectives and concrete “digital targets” for each area of action. It also provides a mechanism for structured cooperation and monitoring.

Every two years, each EU Member State updates its “national strategic roadmap” illustrating strategies and measures it has taken to achieve the Digital Decade targets by 2030 aligned with the Digital Compass. Based on this, the European Commission publishes annual reports on the state of the Digital Decade, assessing progress both at the Member State level and across the EU.

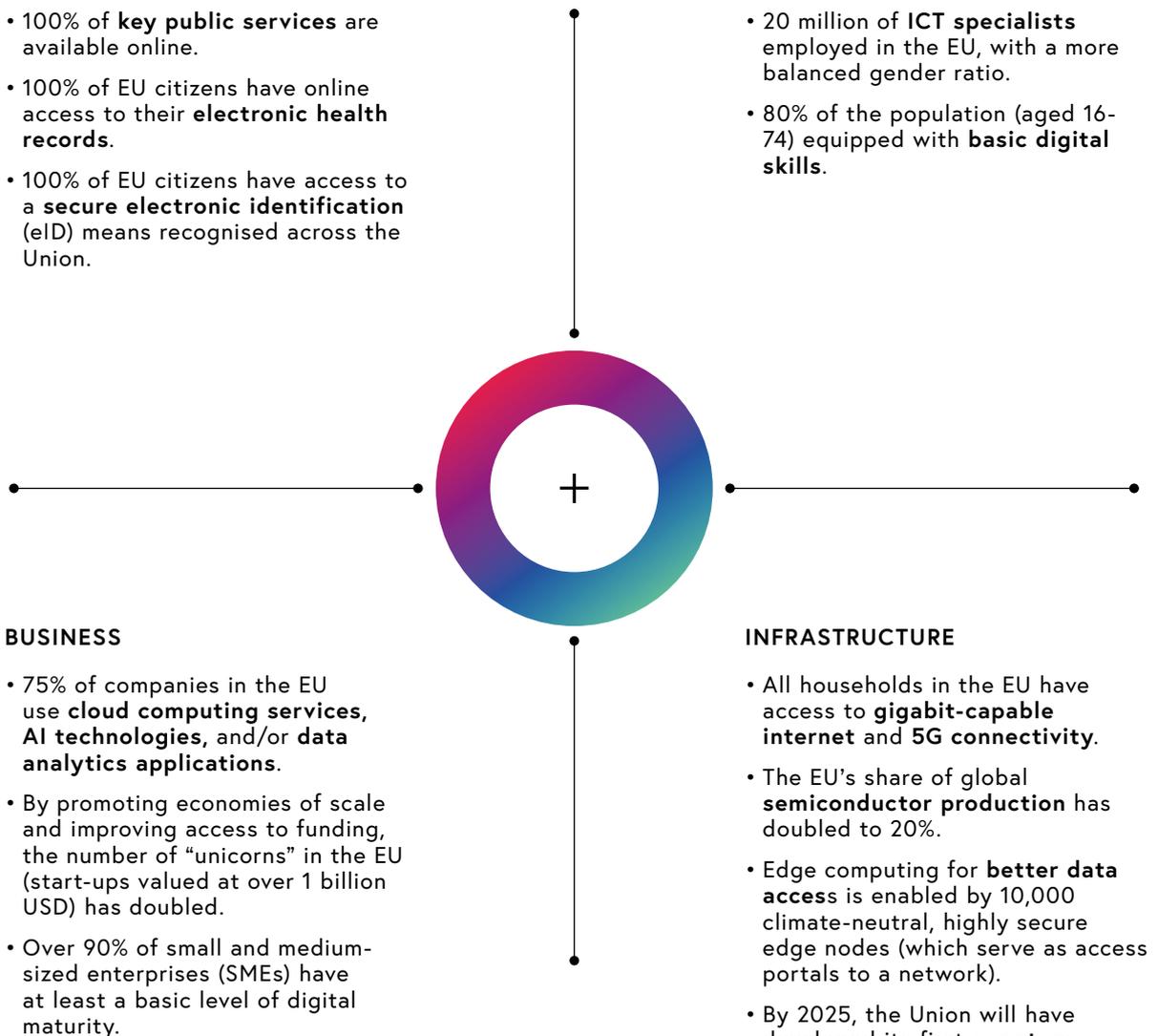
## → Digital Compass 2030 - Digital Decade Targets

### GOVERNMENT

- 100% of **key public services** are available online.
- 100% of EU citizens have online access to their **electronic health records**.
- 100% of EU citizens have access to a **secure electronic identification (eID)** means recognised across the Union.

### SKILLS

- 20 million of **ICT specialists** employed in the EU, with a more balanced gender ratio.
- 80% of the population (aged 16-74) equipped with **basic digital skills**.





# Austria's Strategic Framework

# Austria's Strategic Framework

## → The State of Digital Transformation in Austria

Austria's digitalisation policy, under the umbrella brand "Digital Austria", follows a clear concept: to become a leading digital nation and realise the vision of a "digitally responsible society". This vision seeks to establish the best framework conditions for the successful and independent use of digital technologies across all areas of life.

To build on this vision and achieve the targets of the Digital Compass 2030, the Austrian Federal Government embedded its strategic policy programme within the "Digital Austria Act", adopted in 2023. Austria's digital transformation builds on foundations laid decades ago, and the country plays a pioneering role in Europe in the development of digital services for citizens. Platforms such as the e-government portal "oesterreich.gv.at", the "Digitales Amt" app, FinanzOnline, the Business Information System (GISA), and the Business Service Portal (USP) enjoy international recognition as best-practice examples.

In its Country Report on the State of the Digital Decade, published in July 2024, the European Commission rates Austria as above the EU average in most areas.



Austria provides 100% of its citizens with access to secure electronic identification (eID), achieving the EU's 2030 target ahead of schedule.

- With 96% household coverage of the 5G mobile standard, Austria surpasses the EU average significantly.
- Currently, gigabit-capable internet covers 72.8% of all households in Austria. To reach the target of 100% coverage by 2030, substantial investments in expansion are still required.
- Austria has achieved an impressive mobile-friendliness rate of 99.7% for its digital public services, making it one of the best in the EU.
- The country boasts a digitally savvy population, with 64.7% possessing basic digital skills, compared to the EU average of 55.6%. However, further improvement is needed to reach the target of 80% by 2030.
- Austria excels in skilled labor within the information and communication technology (ICT) sector, with 5.3% of ICT specialists in the total population, ranking 10th in the EU. Nevertheless, there is a shortage of ICT specialists, partly due to the low proportion of women in this field, which stands at just 19.5%.
- Just under 60% of small and medium-sized enterprises (SMEs) in Austria have reached a basic level of digital intensity, placing the country below the EU average. To meet the Digital Decade target of 90% by 2030, Austria is supporting SMEs through national and European Digital Innovation Hubs.

Austria scores 88 out of 100 points for the digitalisation of its healthcare system, well above the EU average of 79. With up to 100% of patients able to access their electronic health records online, Austria ranks among the top in the EU.

- Austria's leading role in the EU in quantum research and the semiconductor industry, along with strong public support for start-ups, are key advantages on the path to successful digitalisation of the economy and society.

## → National strategies for digital transformation

Austria is strategically implementing the Digital Decade targets as outlined in the Digital Compass 2030, with defined trajectories and guiding measures across all areas. These strategies emerged from participatory processes led by experts and stakeholders. They address both cross-cutting issues and specific aspects of digitalisation. The following strategies are particularly relevant to Austria's implementation of the Digital Decade.

### **DIGITAL AUSTRIA ACT**

As the Federal Government's digital work programme, the Digital Austria Act defines 36 digitalisation principles and 117 concrete measures to reshape Austria's digital landscape. Its priorities are cross-departmental and involve all ministries. One key focus is on the "Smart Government of the Future", aiming to provide easy and mobile access to all federal administrative services.

All federal applications and services will be developed with a strong emphasis on user-friendliness, in line with the principles of user-centred design. In the medium term, they should also be optimised for mobile use wherever feasible and technically possible. To achieve this, the following priority areas have been defined:

- Smart Government of the Future
- Digital Connectivity
- Cybersecurity and Cyber Defence
- Digital Transformation of the Economy
- Digitalisation for Climate Protection
- Digital Innovation
- Digital Healthcare
- Digital Competence
- Digital Media, Arts, and Culture
- Digital Universities and Higher Education
- Technology Impact Assessment

One key element is the so-called “digi.check”, which assesses the digitalisation readiness of laws during their review. Another focus lies on further developing the “Digitales Amt” into a smart government platform that enables simple and mobile access to all federal administrative services.

## **DIGITAL ACTION PLAN AUSTRIA**

The vision for a digital Austria, rooted in the guiding principle of a digitally responsible society, forms the foundation of the country’s overarching strategic concept. Alongside established principles and guidelines, this vision provides the framework for sector-specific digitalisation strategies set out in the Digital Action Plan.

## **AUSTRIA'S E-GOVERNMENT STRATEGY**

More than 80 representatives from the Federal Government, states, cities, and municipalities collaboratively developed the e-government Strategy for Austria. This strategy aims to align and further advance the Austrian administration towards a unified, interconnected, and coordinated approach to e-government. The focus is on four key impact areas: “Citizens”, “Businesses”, and “Administration”, which describe the three sectors where people in Austria are expected to benefit from e-government. The fourth impact area, “Overall Architecture and Basic Components”, ensures that Austrian e-government services are coordinated across different jurisdictions within the European context and that efficient and secure data management is implemented. Based on an overarching vision, specific visions and initiatives were developed for all impact areas, including the smart networking of service portals. This will enable all applications, particularly registry queries, to be accessible through the portal network.

## **DIGITAL SKILLS STRATEGY AUSTRIA**

The “Digital Skills Austria” strategy was developed as part of the Digital Skills Initiative for Austria. The principles and concepts behind this strategy were formulated through a nationwide dialogue involving over 500 experts and stakeholders from 80 institutions. It provides the foundation for a focused initiative to improve the digital skills of the Austrian population. The strategy includes a comprehensive skills package with concrete measures, such as the “Digital Everywhere” workshop programme, providing more than 4,500 free events across Austria to impart fundamental skills related to various aspects of digital life.



## STRATEGY FOR ARTIFICIAL INTELLIGENCE

In 2021, the Austrian Government published the national strategy for artificial intelligence (AI), known as the Artificial Intelligence Mission Austria 2030 (AIM AT 2030). This strategy outlines a framework for the responsible use of AI across all areas of life. The implementation of AI in Austria should align with core European values, respecting privacy and the principle of equality, to ensure the greatest possible benefit for all citizens. Furthermore, AI aims to strengthen Austria's position as a hub for research and innovation, as well as a competitive location for technology and business. To achieve this, the widespread adoption of AI by Austria's small and medium-sized enterprises (SMEs) and within the public administration is essential.

The AI Strategy sets out 13 action areas aimed at fostering trustworthy AI and a resilient AI ecosystem. Additionally, an annex to the AI Strategy, published shortly thereafter, identified a further eleven specific areas. In total, the AI Strategy outlines 91 actions designed to establish an optimal and agile framework for the human-centred and public-good use of AI. At the end of 2024, the Austrian Government presented the Implementation Plan 2024, which provides an overview of all the measures outlined in the AI Strategy that were either already being implemented or planned at the time of publication.

## **DATA STRATEGY FOR AUSTRIA**

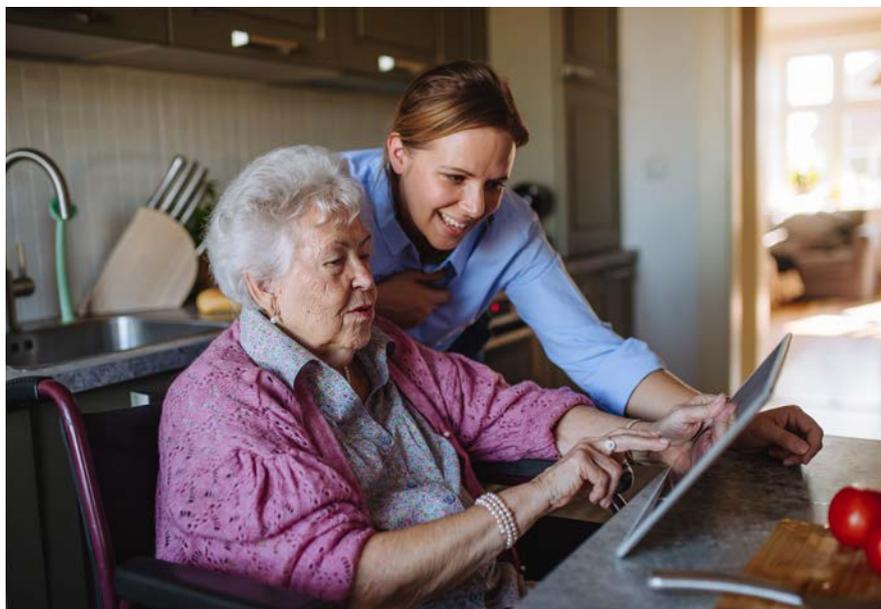
To significantly improve framework conditions for the data economy in Austria, the Federal Government published Austria's Data Strategy in October 2024. This strategy was developed through a participatory process in close cooperation with stakeholders from the Austrian data ecosystem. The Austria's Data Strategy has three main objectives: the further development of data infrastructure, the promotion of responsible data use, and the establishment of an innovative data culture within the country. Consequently, the strategy addresses technical and infrastructural aspects, economic factors, and socio-cultural considerations.

The Data Strategy forms the foundation of Austrian data policy, consolidating all the necessary measures. In line with the vision of "Data Use for the Benefit of Society", the strategy aims to ensure a secure, fair, and efficient use of data, aligning with the European project of a common internal data marketplace and the European Data Strategy.

## **eHEALTH STRATEGY AUSTRIA**

The Austrian eHealth Strategy was published in June 2024, chaired by the Federal Ministry for Social Affairs, Health, Care, and Consumer Protection (BMSGPK). The strategy was developed in coordination with key stakeholders involved in health target management, including the Federal Government, the federal states, and social insurance institutions.

The eHealth strategy aims to establish a common vision for eHealth and digitalisation in the health and care sector in Austria, considering the needs of various target groups. By the year 2030, the Austrian public healthcare system, from prevention to aftercare, will be organised according to the principle of “digital before outpatient before inpatient”.



There were eight strategic goals defined, each further divided into operational objectives with specific measures. The strategy primarily aims to ensure digital access to the healthcare system for all citizens and healthcare providers, enhancing the quality of care, and improving access to information through digital services. The more effective use of health data along the entire care pathway plays a key role. The strategy aims to strengthen the relationship between healthcare providers and patients, improve overall treatment quality, and unlock new potential for research and system management.

## **5G STRATEGY & BROADBAND STRATEGY 2030**

The Federal Government’s 5G strategy, published in April 2018, set out a vision for Austria to become a pioneer in digitalisation. Its goal was to optimise the necessary framework conditions to accelerate the rollout of 5G mobile technology in the years ahead. To complement this effort and ensure broader connectivity, the Federal Government introduced the Broadband Strategy 2030 in August 2019, committing Austria to the EU broadband expansion targets.

The plan aims to achieve nationwide coverage in Austria with symmetrical gigabit-capable access networks by 2030. A dense fibre optic network, combined with universally available mobile coverage, is intended to ensure that every citizen, business, and public institution across the country can benefit equally from the opportunities of digitalisation. The Federal Government is therefore committed to expanding the fixed and mobile communications infrastructure to create gigabit-capable networks using public funds in areas affected by market failure.

## **AUSTRIAN STRATEGY FOR CYBERSECURITY**

Digitalisation and cybersecurity are closely intertwined, given that the benefits and risks of digital technologies are inherently connected. The Austrian Strategy for Cybersecurity (ÖSCS) from 2021 provides the strategic framework to strengthen Austria's digital resilience and enhance overall cybersecurity. It contributes to one of the essential prerequisites for secure and value-driven digitalisation.

The main lines of development defined in the strategy include the decentralised allocation of resources, sustainable capability development, and a commitment to a cooperative national and international approach. Proven structures, such as the Operational Coordination Structure (OpKoord), the Inner Circle of the Operative Coordination Structure (IKDOK), the Cyber Security Steering Group (CSS), and the Cyber Security Platform (CSP), are strengthened and further developed by the strategy to create a secure environment and enable effective and efficient action in the event of crisis developments in cyberspace.

## **OPEN-SOURCE SOFTWARE**

One of Austria's strategic guidelines is to promote the use of open-source software to help safeguard the digital sovereignty of both Austria and the EU.

The use of open source software basically gives everyone working on the development of software - for a service app, for example - the opportunity to drive forward technological developments with fewer dependencies. Using open source software

can therefore strengthen the competitiveness of the European economy. The open source concept is not only in the service of IT security and technical interoperability, but also strengthens collaboration in the research sector and the resilience of value chains, for example.

In the Digital Austria Act, open-source software is a key component of the Smart Government of the Future. Open-source software is also set to play a greater role in the expansion of data infrastructures. At the federal administration level, the Chief Digital Officer Taskforce has established the “Open-Source Software” working group to coordinate all related activities.

#### **FEDERAL GOVERNMENT’S STRATEGY FOR RESEARCH, TECHNOLOGY, AND INNOVATION (RTI) 2030**

The RTI Strategy 2030 reflects a strong commitment to increasing efficiency and output within the system. The work on the FTI-Strategy was largely based on the detailed analysis of “OECD Review of Innovation Policy: Austria 2018”. The European Commission’s Smart Specialisation concept also served as a reference framework for shaping the RTI Strategy 2030. Additionally, several cross-cutting topics were incorporated, including the Sustainable Development Goals (SDGs), gender parity in RTI, responsible science, and open innovation. By integrating core components of the Excellence Initiative, the Location Strategy, and the Tehnology campaign, Austria has undertaken measures to enhance its research and innovation landscape.



Trajectories

# Trajectories

To achieve the EU's digital targets, Austria has developed target-oriented trajectories. The overview below outlines the national trajectories, addressing the current implementation status and selected key measures.<sup>1</sup>

## → Trajectories of Digital Skills

### **EU Targets by 2030:**

- A digitally skilled population, where at least 80% of those aged 16 to 74 have basic digital skills
- A population with at least 20 million ICT specialists employed within the EU

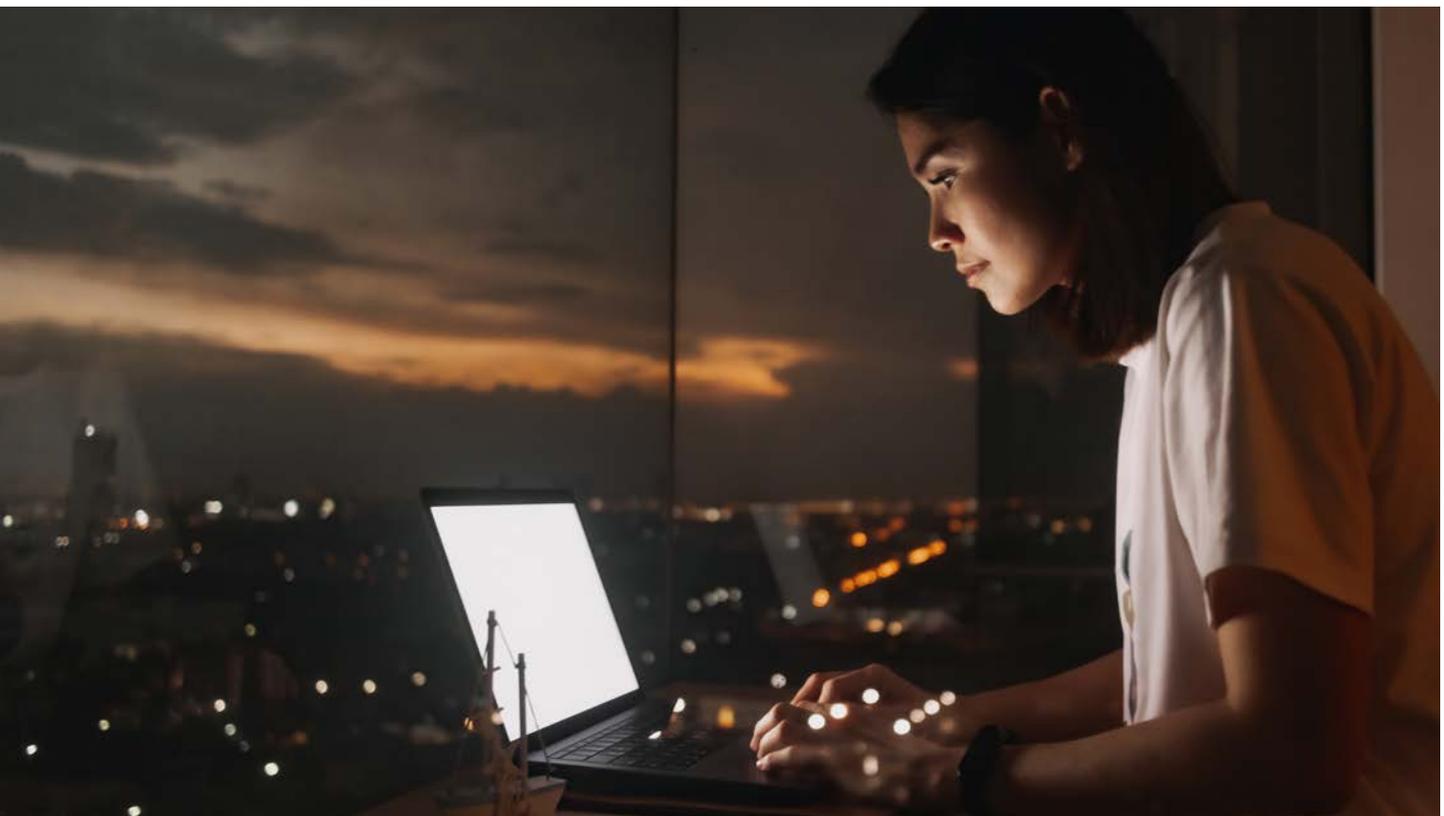
In Austria, approximately 65% of individuals aged 16 to 74 possess at least basic digital skills (DESI 2024). This share is projected to increase to 70% by 2026 and 80% by 2030. In total, 220,700 ICT specialists were employed in Austria in 2022, accounting for 5% of total employment in the country. Compared to 2017, this represents an increase of 32,900 professionals. There is a positive trend regarding the proportion of ICT specialists within overall employment, with a national target of 10% increase by 2030. Additionally, the share of women among ICT specialists has also increased in recent years.

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<sup>1</sup> A detailed overview of all measures can be found in the *National strategic roadmap for the Digital Decade: 2024 Update* – [https://www.digitalaustria.gv.at/eng/insights/downloads\\_EN.html](https://www.digitalaustria.gv.at/eng/insights/downloads_EN.html)

**Key measures:**

- Workshop Programme “Digital Everywhere” as part of the Digital Skills Initiative
- IT Experts White Paper and funding programme to increase the number of IT specialists as part of the Digital Skills Initiative
- 8-Point Plan from the Ministry of Education, Economy and Research for digitalisation in Austrian schools
- MINT Regions from the Ministry of Education, Economy and Research for regional networking to make mathematics, computer science, natural sciences, and technology tangible and engaging
- Qualification Initiative of the Federal Ministry of Labour and Economy for the systematic development and enhancement of skills in companies and their employees in the areas of research, technology, development, innovation, and digitalisation



## → Trajectory of Connectivity

### **EU Target by 2030:**

- 100% connectivity (5G and gigabit-capable internet)

Austrian targets by the end of 2030 include near-comprehensive outdoor availability of 5G and near-comprehensive availability of gigabit-capable access networks. Currently, 5G coverage already reaches 99.5% of all populated areas, while the availability of gigabit-capable internet in Austria stands at around 73% of all households. This development is primarily driven by the private sector expansion efforts of telecommunications providers. Additionally, as part of the federal broadband initiative, expansion is also taking place in areas affected by market failure.

### **Key measures:**

- Initiative Broadband Austria 2030
- Supply obligations within the framework of the multi-band auction

## → Trajectory of Semiconductors

### **EU Target by 2030:**

- At least 20% of the global semiconductor production value being generated in the EU

Austria has a high concentration of internationally active, research-intensive companies operating along the value chain of the semiconductor, supply, and user industries, all distinguished by strong economic performance.

Between 2024 and 2031, nearly EUR 3 billion will be invested at the national level to leverage more than EUR 7 billion in additional investments. Semiconductor companies in Austria are being supported across the entire value chain, with the goal of positioning Austria as one of the world's leading chip hubs.

**Key measure:**

- Investment of EUR three billion by 2031

→ Trajectory of Edge Nodes

**EU Target by 2030:**

- A network of at least 10,000 highly secure edge nodes established across the Union

Edge computing is set to gain significant importance in the coming years. It refers to a network design that allocates high computing power and storage capacity not only at central locations but also at the edges of large networks. This reduces the distance for data-generating and constantly communicating end devices, making the network faster and more efficient overall. Edge computing requires computers that serve as "edge nodes". Currently, Austria has 30 such edge nodes. The regulatory framework in Austria aims to facilitate the implementation of additional edge nodes for communication network operators.

**Key measure:**

- Introduction of 5G, allocation of the frequency spectrum at 26 GHz, and definition of technical parameters in the frequency usage regulation.

## → Trajectory of Quantum Informatics

### **EU Target by 2030:**

- Develop the Union's first quantum computer by 2025, paving the way for a leading position in quantum technology by 2030

Austria aims to foster research, development, and innovation in the field of quantum science and technology, in line with the Austrian Federal Government's RTI policy objectives. This includes both fundamental research and the development of practical applications. Key focus areas include quantum communication, quantum sensing, quantum metrology, quantum simulation, quantum computing, and quantum information.

### **Key measure:**

- Quantum Austria Funding Initiative

## → Trajectory of Cloud Computing

### **EU Target by 2030:**

- At least 75% of enterprises have adopted cloud computing services, AI technologies, and/or data analytics applications, aligned with their business operations

In Austria, around 36% of companies utilise cloud computing services (DESI 2024). The use of cloud services in Austrian companies still has potential for growth. Austria is focusing on supporting small and medium-sized enterprises (SMEs) in adopting and implementing cloud computing.

### **Key measure:**

- Gaia-X Hub Austria

## → Trajectory of Data Analytics

### EU Target by 2030:

- At least 75% of companies have implemented cloud computing services, AI technologies, and/or data analytics applications, depending on their business activities

Currently, around 24% of Austrian companies utilise data analytics (DESI 2024). To support small and medium-sized enterprises (SMEs) in their digital transformation, the Government is promoting direct access for businesses to partners from research and industry in the field of data analytics.

### Key measures:

- Data Strategy for Austria
- National and European Innovation Hubs



## → Trajectory of Artificial Intelligence

### **EU Target by 2030:**

- At least 75% of companies have implemented cloud computing services, AI technologies, and/or data analytics applications, depending on their business activities

So far, only about 11% of domestic companies utilise AI applications (DESI 2024). In order to specifically support small and medium-sized enterprises (SMEs) in their digital transformation, the Government facilitates direct access to research and industry partners in the field of AI.

### **Key measures:**

- AI service desk
- AI marketplace

## → Trajectory of Basis Level of Digital Intensity (SMEs)

### **EU Target by 2030:**

- over 90% of small and medium-sized enterprises (SMEs) in the EU should reach at least a basic level of digital intensity

Around 58% of Austrian SMEs currently achieve at least a basic level of digital intensity (DESI 2024), placing Austria slightly below the EU average and still far away from the Digital Decade targets.

To boost productivity in certain sectors through greater digital intensity, Austria is providing targeted support to SMEs in their digital transformation.

**Key measures:**

- SME.DIGITAL
- National and European Digital Innovation Hubs

→ Trajectory of Unicorns

**EU Target by 2030:**

- Doubling the number of “unicorns” in the EU is a key objective

“Unicorns” are start-ups valued at over 1 billion US dollars. As of 2023, Austria had five unicorns (DESI 2024). Introducing a new legal form of enterprise that offers an internationally competitive framework, particularly for innovative start-ups and early-stage ventures, can make a significant contribution to increasing this number. The national goal is to reach ten unicorns by 2030.

**Key measures:**

- Flexible Company
- aws Start-up Fund II
- aws Start-up Invest

## → Trajectory of Digitalisation of Public Services – Citizens

### EU Target by 2030:

- 100% online provision of key public services

Austria provides convenient and centralised access to digital services through the citizen service platform [oesterreich.gv.at](https://www.oesterreich.gv.at) and the “Digitales Amt” app. With a single login via ID Austria, users can seamlessly access a wide range of administrative services thanks to Single Sign-On. Currently, 80.7% of public services are available online (DESI 2024). A 2024 study commissioned by the Federal Chancellery serves as a strategic foundation for the further expansion of digital services in the coming years.

### Key measure:

- Expansion of digital services



## → Trajectory of Digitalisation of Public Services – Businesses

### **EU Target by 2030:**

- 100% online provision of key public service

The Business Service Portal (USP) serves as Austria's central information and service platform for businesses, providing a single access point for completing official tasks online. With once-only registration, businesses can efficiently manage administrative procedures securely and without delays. Austria has already achieved 82.9% online availability of essential services for businesses (DESI 2024).

### **Key measures:**

- Once-only principle for the fulfilment of information duties in accordance with federal law
- eDelivery
- Further development of the Business Service Portal (USP)

## → Trajectory of Electronic Health Records

### **EU Target by 2030:**

- 100% of Union citizens have access to their electronic health records

Approximately 97.5% of individuals registered and covered by social insurance in Austria currently have access to their Electronic Health Record (ELGA), either online or with assistance from the ELGA Ombudsman's Office. Since 2024, all residents of Austria who are not covered by social insurance, around 200,000 people, have also gained access to ELGA. This expansion has increased the overall proportion of the population with ELGA access to 99.8%. However, due to incomplete registration in

Austria, approximately 20,000 individuals (or 0.2% of the population) remain without access to ELGA. The existing opt-out system for ELGA means that the digital target of 100% access has effectively been achieved today.

**Key measure:**

- Availability of medical imaging data for citizens in ELGA

→ Trajectory of Electronic Identification (e-ID)

**EU Target by 2030:**

- Ensure that 100% of Union citizens have access to a secure electronic identification (eID) recognised across the entire Union

Today, 100% of Austrian citizens have access to a secure digital proof of identity through ID Austria, which is recognised throughout the Union. ID Austria empowers citizens with unrestricted control over identity transactions and the personal data they transmit. Efforts are ongoing to innovate and enhance the services available.



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