The geography of Europe's brain business jobs: 2025 Index

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Foreword: Klas Tikkanen

The mapping of the geography of Europe's knowledge-intensive jobs has been going on since 2017. This work is gaining increasing attention from national and regional governments, educators, researchers, and businesses across Europe. The governments of Ireland and Estonia have for example leveraged the brain business jobs index for their innovation policy planning. Chambers of commerce, regional governments, universities and scholars rely on the information from this index. It has global impact, serving as university course literature in countries such as India and Mexico for better understanding the shifting economy of Europe.

This year's index shows a rebounding from the crises for particularly Sweden, which climbs to third place again, and also neighboring Denmark. The capital regions of Stockholm and Copenhagen have also rebounded. This year's index also compares the share of adults employed in brain business jobs in each nation, with the share of engineers and scientists in the population. There is a close link, with some countries punching above their weight.

For example, Sweden is the most expert dense country, but punches slightly below its weight. Ireland and Switzerland punch above their weight, they have less share of adults who are engineers and scientists than Sweden, but yet more brain business jobs. While expert density is an important driver of knowledge intensive jobs, we also see that countries with business-friendly policies and lower taxes tend to attract more of these jobs than a model based on expert density alone would suggest.

As a leading private equity investor in Europe, Nordic Capital is committed to supporting research that explores how knowledge can enhance investment conditions. Europe is increasingly becoming an integrated marketplace, with knowledge-intensive jobs growing rapidly in regions which offer the most attractive conditions.

Brain business jobs tend to be high up in the value chain, in advanced businesses that typically create regional export values. These jobs stimulate other jobs in the businesses that are under suppliers, and indirectly also boost the local purchasing power and tax revenues which foster more local service work, and more public municipal and regional revenues which often is spent on hiring more staff. A comparison of European regions shows that those regions where a high share are employed in brain business jobs also tend to have lower unemployment levels.

Knowledge-intensive jobs matter, for a well-functioning labor market. Fostering these jobs remains a crucial challenge for national and regional policymakers. Nordic Capital is pleased to contribute to this understanding, with the hope that it leads to further growth in knowledge-intensive jobs across Europe.

Klas Tikkanen, Chief Operating Officer, Nordic Capital Advisors.
Klas has helped drive Nordic Capital's transformation in the past decade, including the development of its strategy, governance, culture, and operations. He sits on Nordic Capital's top management company board, the investment review committees for Nordic Capital Flagship and Evolution funds, portfolio review committee, fair value committee, operations advisory board, and value portfolio committee, as well as chairing the HR and compensation committee and charities boards.

Summary

- **Brain business jobs recover in Sweden and Denmark. Ireland however has surged ahead of Sweden and is nearly as knowledge intensive as Switzerland.**
- **Estonia has highest brain business jobs concentration in Central Europe, while Malta leads in Southern Europe.**
- **Cyprus and Portugal have since 2014 more than doubled the share of adults employed in brain business jobs. Bulgaria, Lithuania and Croatia have doubled it.**
- **Strong link exists between the share of engineers and scientists amongst adults and the share of adults employed in brain business jobs, yet some countries punch above or below their weight.**
- **6 out of the top 10 regions with the highest share of brain business jobs regions are found in Central Europe, 2 in Western and 2 in the Nordics.**
- **Fostering high-value-creating jobs remains important for the regional labor markets of Europe.**

The study *The geography of Europe's brain business jobs* measures the share of the working-age population across Europe employed in highly knowledge-intensive enterprises. The data is compiled through an analysis of detailed structural business statistics for European countries and regions. This is the seventh edition of the index, which is used by national governments, regional governments, universities, and businesses to better understand the changing geography of enterprise in Europe.

By looking at the share of the population employed in high-value-creating sectors in 33 European countries and 243 regions within these countries, this study finds a significant link to regional unemployment. Regions that have a high share of brain business jobs tend to have lower level of unemployment than those with a lower share of knowledge-intensive jobs.

Brain business jobs recover in Sweden and Denmark. Ireland however has surged ahead of Sweden and is nearly as knowledge intensive as Switzerland. Sweden used to have the second highest share of adults employed in brain business jobs, fell significantly behind during the recent crises, and has now rebounded to a third position. Ireland is ahead of Sweden and nearly as knowledge intensive as Switzerland. Sweden has however despite this fallen behind fast-growing Ireland. Ireland currently has 11.2 percent of its adults employed in the most knowledge intensive jobs. This is essentially the same rate as Switzerland, which still retains a narrow lead. In Sweden 10.3 percent of adults are employed in brain business jobs, compared to 9.9 percent in Denmark and 9.8 percent in the Netherlands. Out of the top 5 nations, three are in Western Europe and two in the Nordics.

Cyprus and Portugal have since 2014 more than doubled the share of adults employed in brain business jobs. Bulgaria, Lithuania and Croatia have doubled it. The most significant increase in share of adults employed in brain business jobs has occurred in Cyprus, where the share has increased by fully 136 percent between 2014 and 2025. Portugal is second, with 105 percent increase. The rate has nearly doubled in Bulgaria (99 percent increase), Lithuania (90 percent) and Croatia (89 percent). Lowest rate of increase is in high-cost Luxembourg (2 percent increase), followed by Iceland (6 percent).

Strong link exists between the share of engineers and scientists amongst adults and the share of adults employed in brain business jobs, yet some countries punch above or below their weight. In Sweden fully 13.4 percent of adults are engineers and scientists, more than 12.5 percent in the Netherlands and 11.9 percent in Switzerland and Ireland. In Norway 11.4 percent of adults are engineers and scientists, compared to 11.2 percent in Denmark and Iceland. Nordic countries tend to punch below their weight, having fewer share of adults employed in brain business jobs than would be predicted based on a model of share of adults who are engineers and scientists. Countries such as Ireland and Switzerland conversely punch above their weight, having a higher share. This reflects that brain business jobs are affected not only by expert density, but also policy factors such as business friendly and low tax policies.

6 out of the top 10 regions with the highest share of brain business jobs regions are found in Central Europe, 2 in Western and 2 in the Nordics. Bratislava regains the position as the region with the highest share of adults in brain business jobs, followed by Prague, Budapest, Bucharest, Copenhagen and Stockholm. Brabant wallon in Belgium is the only region in the top 10 list which is not a capital region, and is followed by Zagreb, Warsaw and Dublin in share of adults employed in the most knowledge intensive jobs. Out of the top ten regions six are in Central Europe, two in the Nordic, two in Western Europe and none in Southern Europe. Paris and Lisbon are the two Southern European regions with the highest share of adults in brain business jobs.

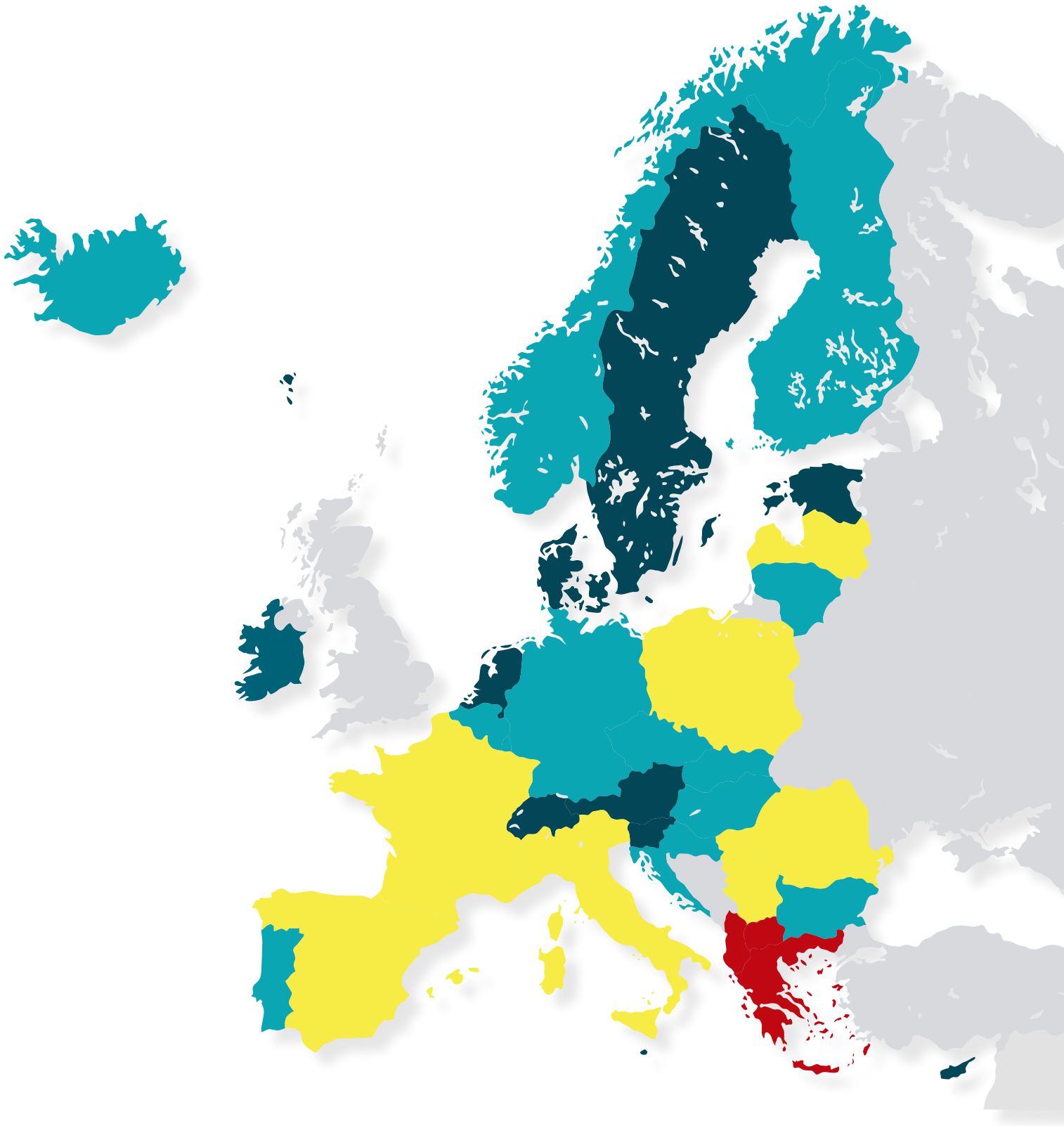
Fostering high-value-creating jobs remains important for the regional labor markets of Europe. Each percentage point higher share of the population of European regions employed in brain business jobs is linked to 0.24 percentage points lower regional unemployment. Meaning that in a region where 10 percentage points more of the population is employed in brain business jobs, the average unemployment is 2.4 percent lower, compared to the typical European region.

Table 1. *Rate of change in brain business jobs concentration (per capita working-age inhabitants) between 2014 and 2025*

Cyprus	136%
Portugal	105%
Bulgaria	99%
Lithuania	90%
Croatia	89%
Romania	83%
Poland	80%
Slovenia	69%
Estonia	67%
Slovakia	64%
Malta	62%
Hungary	50%
Spain	50%
Italy	46%
Czechia	41%
Latvia	39%
Belgium	30%
Netherlands	25%
Germany	22%
Austria	22%
Norway	21%
Finland	18%
France	17%
Greece	16%
Sweden	15%
Switzerland	11%
Denmark	11%
Iceland	6%
Luxembourg	2%

Source: Own analysis of Eurostat structural business statistics, short-term business statistics, and population data. Note: Ireland, Serbia, North Macedonia, and Albania had no complete data for previous years, and is therefore excluded in this historical comparison. The UK is unfortunately no longer included due to the data not being reported since Brexit.

Figure 1. *Share of the workforce in brain business jobs*



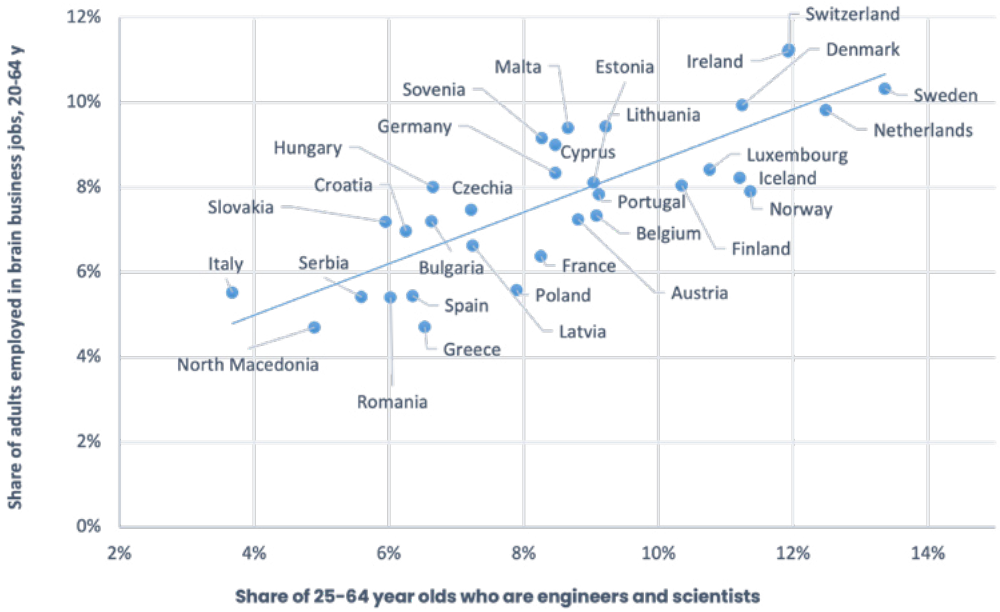
Close link between expert density and brain business jobs

This year's index includes a comparison of expert density and brain business jobs. Those countries with a higher share of adults who are engineers and scientists tend also to have a higher share of adults employed in brain business jobs. While of course not all who are engineers and scientists work with brain business jobs, and many who work with brain business jobs are not engineers and scientists, a close link exists between these two factors.

In Sweden fully 13.4 percent of adults are engineers and scientists, more than 12.5 percent in the Netherlands and 11.9 percent in Switzerland and Ireland. In Norway 11.4 percent of adults are engineers and scientists, compared to 11.2 percent in Denmark and Iceland.

The purple line in image 2 shows the linear regression line of how expert density relates to brain business jobs, on average for the European countries. Those countries which are above the line punch above their weight – indicating policies conductive to attracting knowledge intensive jobs. Those below punch below their weight – having lower brain business jobs density than would on average been found with a country with same expert density.

Figure 2. Sweden leads the engineers & scientist ranking, Switzerland & Ireland are slightly behind but have higher brain business jobs share



Some European countries punch above their weight in expert density

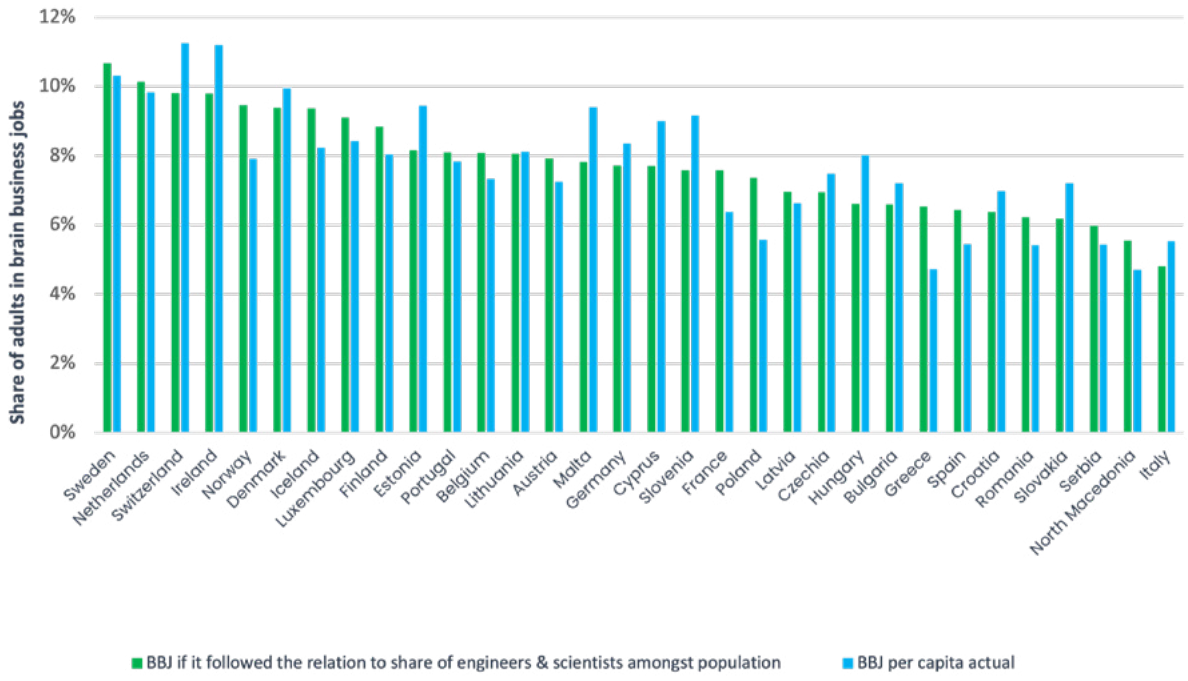
If the share of brain business jobs were dependent solely on expert density, Sweden would be on top. However, like other Nordic nations, Sweden punches slightly below its weight – having a lower share of adults employed in brain business jobs than what would be predicted by a model based on share of adults who are engineers and scientists.

Countries such as Ireland and Switzerland conversely punch above their weight, having a higher share. The same is true of Estonia and Malta, the leaders in terms of brain business jobs concentration in Central Europe respectively Southern Europe.

Policy matters for brain business jobs growth. Ireland, Switzerland, Estonia and Malta are countries characterized by business-friendly policies and lower taxes, which explains why they have a higher share of adults employed in brain business jobs than what a model based on share of engineers and scientists in the population would predict. For European nations to succeed, they need to combine expert density with business-friendly policies that reduce firm costs.

Ireland, Switzerland, Estonia and Malta are countries characterized by business-friendly policies and lower taxes, which explains why they have a higher share of adults employed in brain business jobs.

Figure 3. Share of adults in brain business jobs, if it followed the relation with share of engineers & scientists, and actual



Leading brain business jobs regions of Europe

Slovakian capital region of Bratislava, which again climbs to first position, followed by the Czech capital region Prague, and the Hungarian capital region Budapest. The Romanian capital region of Bucharest ranks at fourth spot. The four top regions in terms of brain business jobs concentration are Central European capital regions. Ample supply of talents, lower costs and lower taxes benefit these regions. The Danish capital region of Copenhagen and the Swedish capital region of Stockholm follow on fifth respectively sixth spot.

In total numbers, there are 1.1 million brain business jobs in the French capital region Paris, 586 000 in the Spanish capital region Madrid, 550 000 in the north Italian region Lombardia, 453 200 in the German region Oberbayern including Munich, and 365 800 in Spanish Cataluña including Barcelona.

Table 2. *Regional Ranking of brain business jobs*

Rank	Region	Percentage of the adult (20-64 years old) population employed in brain business jobs
1	Bratislava	24,5%
2	Prague	23,8%
3	Budapest	22,1%
4	Bucharest	21,5%
5	Copenhagen	20,8%
6	Stockholm	19,2%
7	Brabant wallon	19,2%
8	Zagreb	18,9%
9	Warsaw	18,1%

10	Dublin	17,8%
11	Hamburg	17,5%
12	Sofia	17,3%
13	Oberbayern	16,2%
14	Berlin	15,9%
15	Vilnius	15,5%
16	Amsterdam	15,3%
17	Utrecht	14,7%
18	Paris	14,4%
19	Lisbon	14,2%
20	Helsinki	13,9%
21	Madrid	14%
22	Vienna	13%
23	Darmstadt	13%
24	Brussels	12%
25	Oslo	12%
26	Southern Ireland	12%
27	Ljubljana	12%
28	Limburg (NL)	11%
29	Mittelfranken	11%
30	Karlsruhe	11%

31	**Stuttgart**	**11%**
32	**Prov. Vlaams-Brabant**	**10%**
33	**Köln**	**10%**
34	**Tübingen**	**10%**
35	**Bremen**	**9%**
36	**Noord-Brabant**	**9%**
37	**Lombardia**	**9%**
38	**Västsverige**	**9%**
39	**Midtjylland**	**9%**
40	**Cyprus**	**9%**
41	**Prov. Antwerpen**	**9%**
42	**Zuid-Holland**	**9%**
43	**Sydsverige**	**9%**
44	**Athens**	**8%**
45	**Dresden**	**8%**
46	**Rome**	**8%**
47	**Jihovýchod**	**8%**
48	**Gelderland**	**8%**
49	**Małopolskie**	**8%**
50	**Düsseldorf**	**8%**

Capital regions are marked in **blue.** Smaller countries such as Iceland and Malta make up single NUTS2 regions and are marked in **green**. Regional data is not available for Switzerland and Ireland.

Mapping Europe's brain business jobs

For an investor, a business, or an employee choosing where to locate, the characteristics of regions and countries matter. Previous studies that have attempted to identify knowledge-intensive industries tend to end up with the following four knowledge-intensive types of business, namely the *tech sector*, *ICT (information and communications technology)*, *advanced services,* and *creative professions*. These broad fields are in the data analysis divided into twelve subfields, as shown below. This comprehensive way of defining brain business jobs includes not only those who work with novel technological solutions but also the creators and advanced service providers who play a key role in modern societies.

Table 2. *Regional Ranking of brain business jobs*

Tech sector	High-tech Manufacturing Engineering/Architecture Research and Development Pharmaceutical industry
ICT	Telecom IT Services Computer Programming
Advanced services	Head office Management Advertising and Market Research
Creative professions	Publishing Media Design and other Creative Work

The source of the data is structural business statistics, published by the European statistics agency Eurostat. Through this comprehensive database of activity in the business sector, the share of people who work in *highly specialized knowledge-intensive workplaces or local units of firms* is measured. Structural business statistics are highly detailed, but since they rely on firms' annual accounts, and firms have different accounting years, the data measures the situation two years previously. Quarterly employment statistics are added to the analysis to estimate brain business jobs also during the latter two years. The technical source of regional data is SBS data by NUTS 2 regions and NACE Rev. 2. Other data, such as unemployment levels, energy usage and electricity prices, are also gathered from Eurostat databases.

The statistical unit used for regional SBS is the local unit, which is an enterprise or part of an enterprise situated in a geographically identified place. Local units are usually classified under NACE according to their main activity. Manufacturing industries (except high-tech manufacturing and pharmaceuticals which are counted as brain business jobs, as well as electricity & gas) and professional services (except engineering & architecture, R&D, telecommunications, IT Services, programming, head office & management, advertising & market research, publishing, film/TV/music, and design & other creative professions, which are counted as brain business jobs) are also included in the analysis. Together brain business jobs, manufacturing industries jobs, and professional services jobs are referred to as high-value-creating sector jobs. These jobs are important for regional economic activity, bringing in export revenues and are often also drivers of innovation.

Short-term and long-term business data, as well as population data, all have Eurostat as their source. Following Brexit, data is no longer available for the UK. National data for 33 countries are included in this study. These countries are the 27 EU member states plus Switzerland, Norway, Iceland, Serbia, Albania and North Macedonia.

Data over the working-age (20-64 years old) population is calculated for the corresponding years in each region and country—again with Eurostat as the source. In total, 7.0 percent of the working-age population of the 33 studied European countries work in brain business jobs. Additionally, 16.6 percent work in manufacturing industries, and 9.9 percent work in professional services.

Figure 4. *The high-value-creating jobs sectors of Europe*

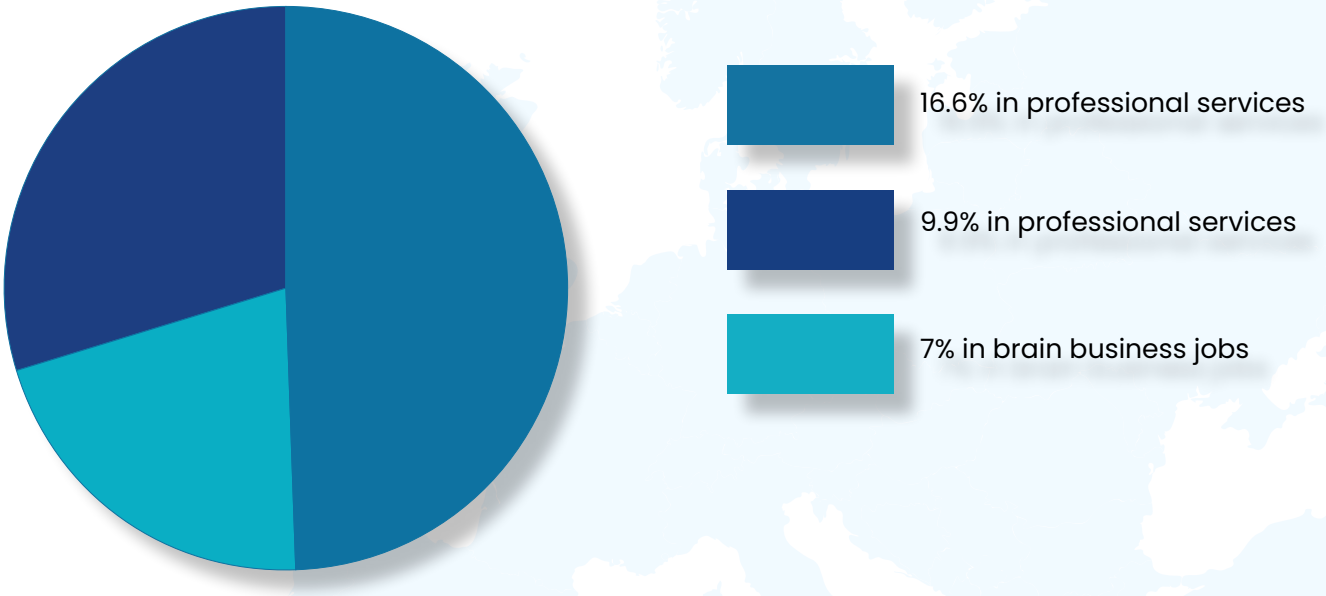


Table 4. *Detailed brain business jobs, manufacturing jobs, and professional services jobs rating for European nations*

	Tech sector BBJ	ICT sector BBJ	Advanced services BBJ	Creative professions BBJ	BBJ per capita total	Manufacturing industries per capita	Professional services per capita
Switzerland	5.9%	2.7%	1.9%	0.8%	**11.2%**	15.7%	10.6%
Ireland	3.3%	3.9%	2.3%	1.6%	**11.2%**	13.4%	13.5%
Sweden	3.0%	3.3%	2.0%	2.0%	**10.3%**	17.4%	10.1%
Denmark	3.7%	2.8%	1.9%	1.6%	**9.9%**	14.7%	10.5%
Netherlands	2.4%	3.0%	3.1%	1.3%	**9.8%**	12.3%	10.8%
Estonia	2.1%	4.1%	1.8%	1.5%	**9.4%**	19.1%	9.0%
Malta	2.5%	3.2%	2.6%	1.1%	**9.4%**	11.3%	14.0%
Slovenia	3.4%	2.5%	2.2%	1.0%	**9.2%**	23.9%	9.4%
Cyprus	1.2%	3.6%	3.0%	1.3%	**9.0%**	12.7%	16.4%
Luxembourg	2.1%	4.4%	1.3%	0.5%	**8.4%**	20.6%	20.9%
Germany	3.1%	2.7%	1.5%	1.1%	**8.3%**	21.1%	10.9%
Iceland	2.4%	3.4%	0.9%	1.5%	**8.2%**	17.7%	16.2%
Lithuania	1.8%	3.2%	1.9%	1.2%	**8.1%**	20.9%	16.8%
Finland	2.7%	2.9%	1.2%	1.3%	**8.0%**	14.3%	7.7%
Hungary	2.7%	2.5%	1.6%	1.2%	**8.0%**	18.0%	8.5%
Norway	2.6%	2.6%	1.4%	1.3%	**7.9%**	17.4%	9.4%
Portugal	1.8%	2.8%	2.1%	1.1%	**7.8%**	19.5%	13.9%
Czechia	2.6%	2.5%	1.2%	1.2%	**7.5%**	25.7%	9.2%
Belgium	2.0%	2.1%	2.6%	0.6%	**7.3%**	12.3%	7.5%
Austria	2.5%	2.1%	1.6%	1.0%	**7.2%**	18.8%	11.3%
Bulgaria	1.4%	3.8%	0.9%	1.1%	**7.2%**	17.9%	9.9%
Slovakia	1.8%	2.4%	2.1%	0.8%	**7.2%**	20.4%	7.3%
Croatia	2.1%	2.8%	1.2%	0.8%	**7.0%**	19.2%	11.2%
Latvia	1.3%	3.4%	1.1%	0.9%	**6.6%**	15.7%	9.8%
France	2.0%	2.1%	1.3%	1.1%	**6.4%**	13.9%	8.8%
Poland	1.4%	2.3%	1.1%	0.7%	**5.6%**	19.3%	7.4%
Italy	1.7%	1.8%	1.0%	1.0%	**5.5%**	16.9%	10.2%
Spain	1.5%	1.9%	1.2%	0.9%	**5.4%**	12.0%	10.7%
Serbia	1.4%	2.5%	1.1%	0.4%	**5.4%**	16.3%	7.4%
Romania	1.5%	2.3%	1.0%	0.7%	**5.4%**	14.6%	6.7%
Greece	1.7%	1.2%	1.2%	0.6%	**4.7%**	10.5%	14.4%
North Macedonia	1.4%	2.2%	0.5%	0.5%	**4.7%**	16.8%	7.7%
Albania	0.5%	0.4%	0.6%	0.1%	**1.7%**	10.0%	6.8%

Brain business jobs and unemployment

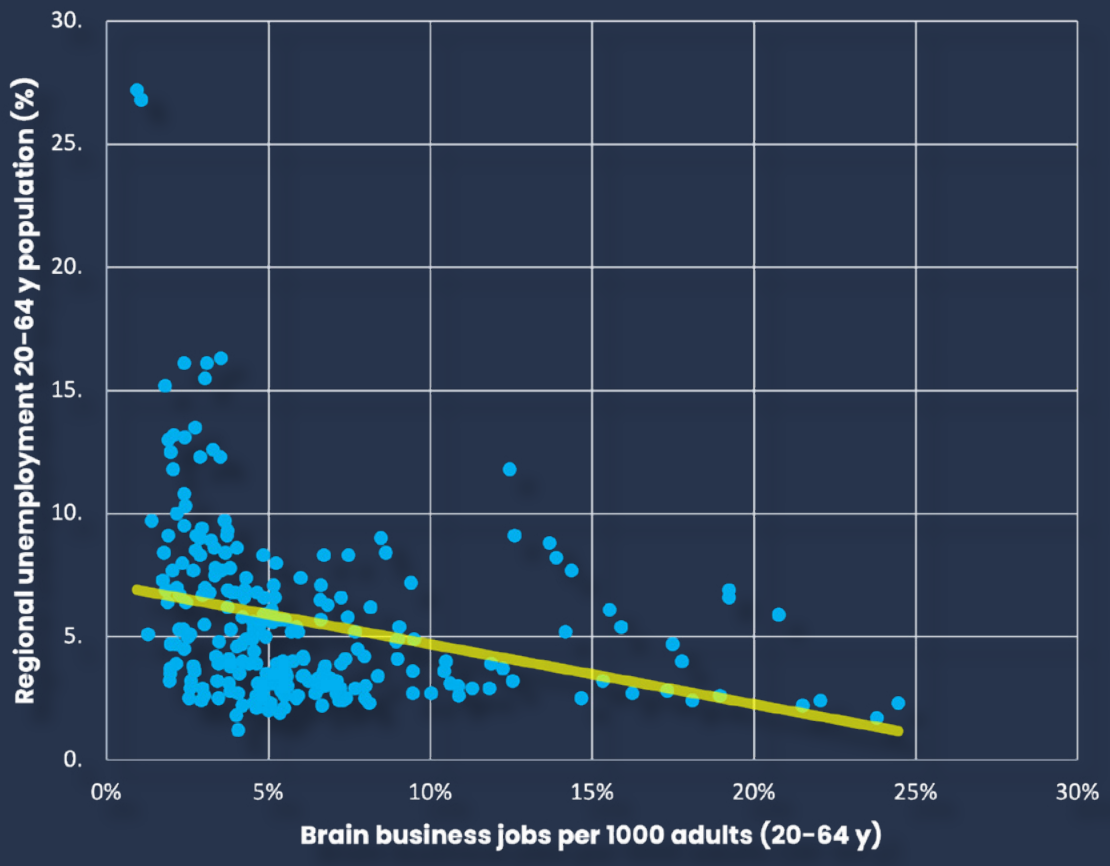
There is a link between brain business jobs, on a regional level, and unemployment. A comparison of European regions shows that those regions where a high share are employed in brain business jobs also tend to have lower unemployment levels.

This is explained by the fact that these jobs are high on the value chain, creating regional exports and stimulating the local economy also indirectly. Brain business jobs tend to stimulate other jobs in the businesses that are under suppliers. Additionally, since brain business jobs are typically well-paid, they indirectly also boost the local purchasing power and create tax revenues. In turn this creates more demand for local private service work, and more resources for municipalities and regions hiring public employees.

Each percentage point higher share of the population of European regions employed in brain business jobs is linked to 0.24 percentage points lower regional unemployment. This is shown through comparison of those European regions for which data exists. The results mean that in a region where 10 percentage points more of the population is employed in brain business jobs, the average unemployment is 2.4 percent lower, compared to the typical European region. It is therefore crucial for local competitiveness, and jobs, to attract and maintain brain business jobs.

The results mean that in a region where 10 percentage points more of the population is employed in brain business jobs, the average unemployment is 2.4 percent lower, compared to the typical European region.

Figure 5. *European regions with high share of brain business jobs have lower unemployment*



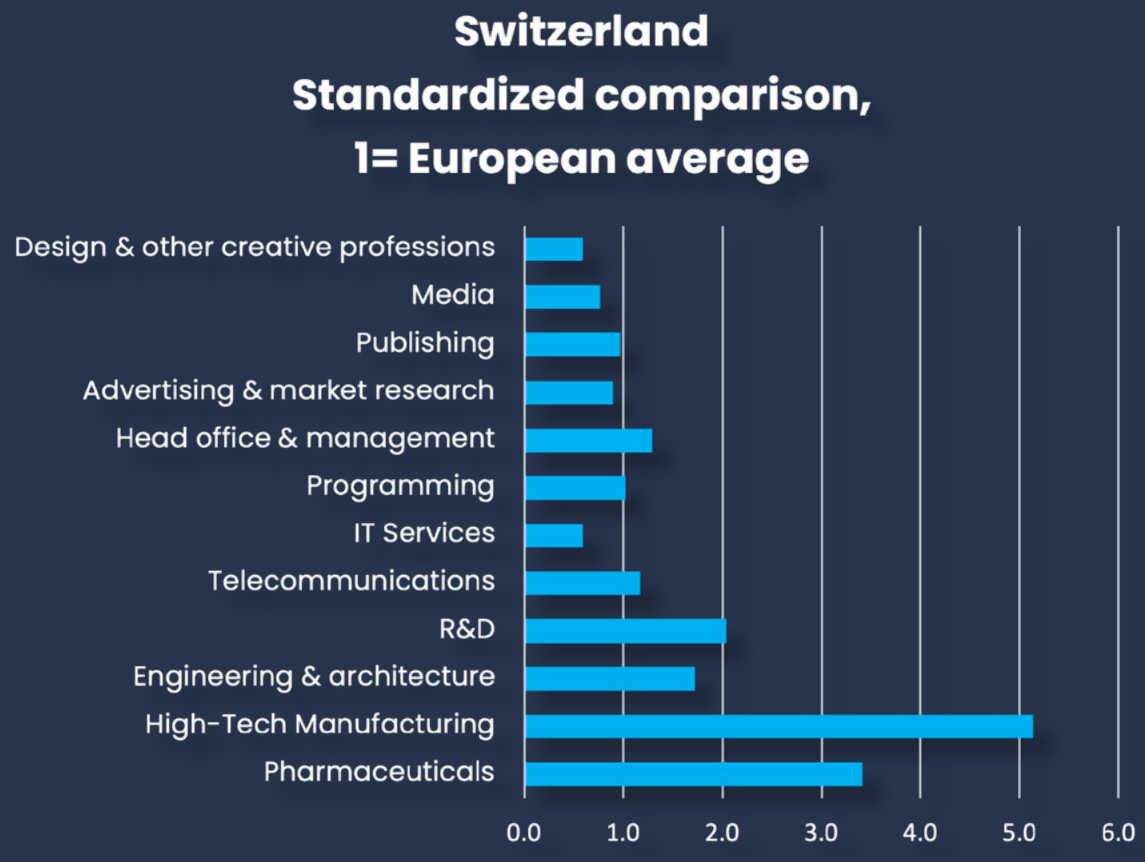
Switzerland

- In 2025, 11.2 percent of the working-age adults of Switzerland are employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is an improvement from 11.0 percent the previous year. Long-term the share of brain business jobs has grown from 10.1 percent in 2014. Switzerland remains, as in all previous editions of this index, the European country with the highest concentration of knowledge-intensive jobs. Ireland is however close to catching up.

- Amongst the total population of Switzerland, 11.9 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Switzerland overperforms, having 1.4 percentage points higher share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation. This signifies that tax and other economic policy factors boost Switzerland's performance.

- Further 15.8 percent of adults in Switzerland are employed in manufacturing industries, while 10.4 percent are employed in professional services. Together with those employed in brain business jobs, 37.2 percent of adults are employed in high value creating sectors. Employment in these parts of the economy tends to bring in export revenues and has high value production per employee. These jobs in turn tend to stimulate economic activity in the rest of the economy.

- Switzerland has particular relative strengths in high-tech manufacturing, with some 121 000 jobs in this sector, as well as in pharmaceuticals, where 56 650 are employed.


Switzerland
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
0.0
1.0
2.0
3.0
4.0
5.0
6.0

Ireland

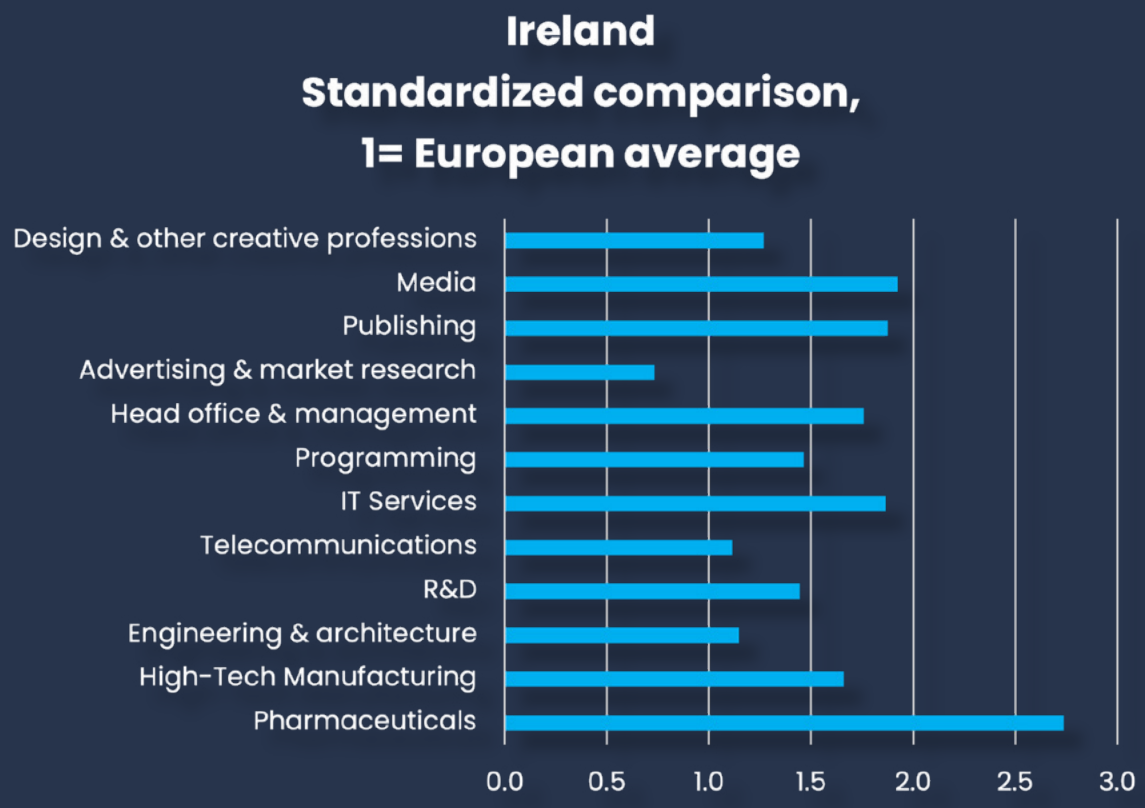
- In 2025, 11.2 percent of the working-age adults of Ireland were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is an improvement from 10.6 percent the previous year. Ireland is now the country in Europe with second-highest concentration of knowledge-intensive jobs, closely behind Switzerland in first spot. While the share in Switzerland is 11.24 percent, it is 11.2 percent in Ireland.

- Amongst the total population of Ireland, 11.9 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Ireland overperforms, having 1.4 percentage points higher share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation. This signifies that tax and other economic policy factors boost Ireland´s performance.

- In the Dublin capital region 17.8 percent are employed in brain business jobs, the 10th highest share in a regional comparison, with all European regions that data exists for. Southern Ireland also has a high share, 11.9 percent.

- Ireland has particular relative strengths in pharmaceuticals, where 26 700 are employed. The country also has a relatively strong media sector, with 11 800 employees.

	Brain business jobs per capita
Dublin	**17.8%**
Southern Ireland	**11.9%**
Northern and Western Ireland	**7.2%**


Ireland
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
0.0
0.5
1.0
1.5
2.0
2.5
3.0

Sweden

- In 2025, 10.3 percent of the working-age adults of Sweden were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is a recovery from the downturn of brain business jobs previous years, and a return to normal for Sweden. The level has risen from 9.0 percent in 2014. Sweden used to be the EU-nation with the highest share but has been outpaced by Ireland which thanks to competitive taxes and business climate has had a strong growth.

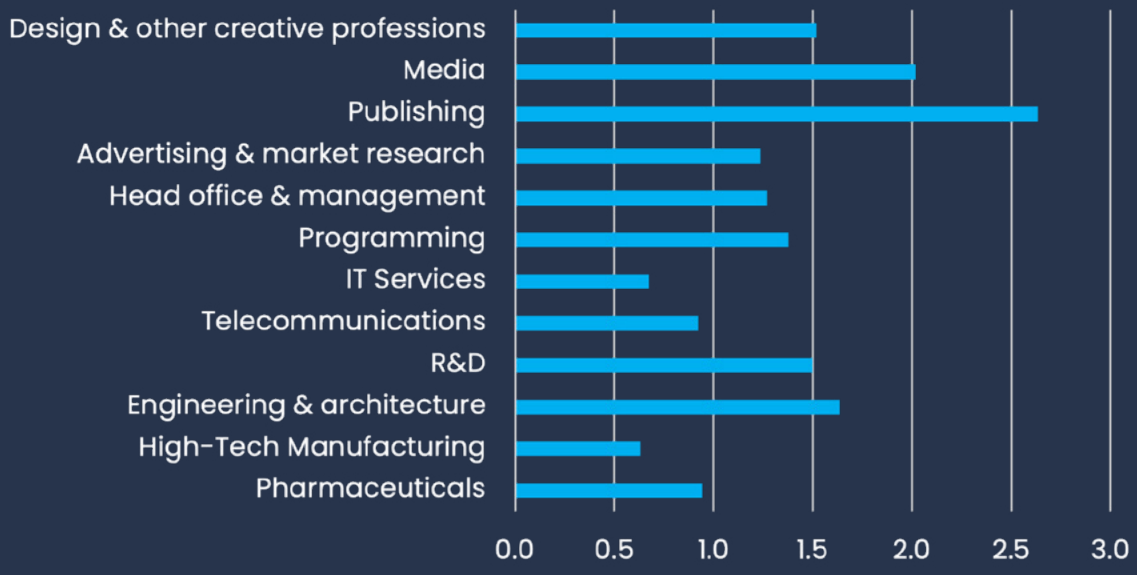
- Amongst the total population of Sweden, 13.4 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Sweden underperforms, having 0.3 percentage points lower share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the capital region of Stockholm, fully 19.2 percent of adults are employed in brain business jobs. This is the 6th highest share in a regional comparison, with all European regions that data exists for. Västsverige and Sydsverige regions also have high shares, 9.4 and 8.6 percent, respectively.

- Sweden has particular relative strengths in publishing, where 48 750 are employed. The country also has a relatively strong engineering & architecture sector, with 126 450 employees.

	Brain business jobs per capita
Stockholm	**19.2%**
Västsverige	**9.4%**
Sydsverige	**8.6%**
Övre Norrland	**7.8%**
Mellersta Norrland	**7.2%**
Östra Mellansverige	**6.7%**
Småland med öarna	**5.4%**
Norra Mellansverige	**5.1%**

Sweden
Standardized comparison, 1= European average



Denmark

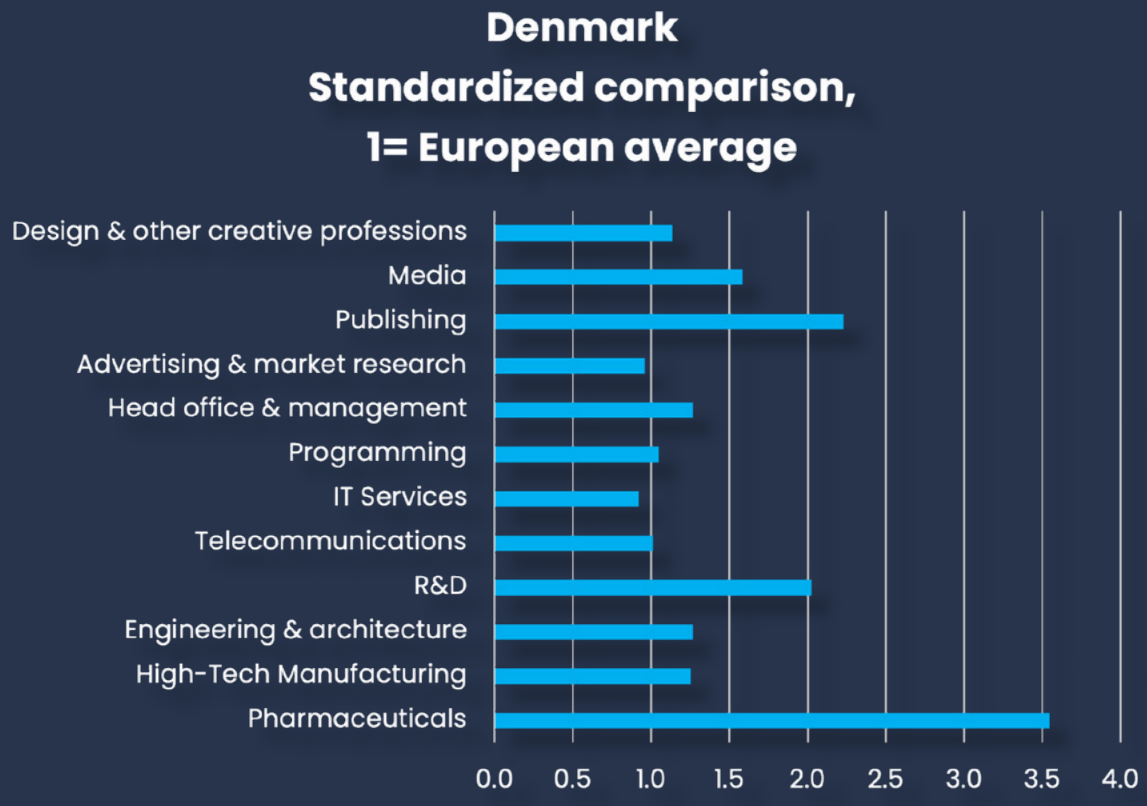
- In 2025, 9.9 percent of the working-age adults of Denmark were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is a significant increase from 9.2 percent the year before. Denmark is now the country in Europe with fourth-highest concentration of knowledge-intensive jobs.

- Amongst the total population of Denmark, 11.2 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Denmark overperforms, having 0.6 percentage points higher share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Copenhagen region, 20.8 percent of the adults are employed in brain business jobs, this is the 5th highest share in a regional comparison, with all European regions that data exists for. Midtjylland also has a high share of brain business jobs, 9.0 percent of the adults.

- Denmark has particular relative strengths in pharmaceuticals, where 37 250 are employed. The country also has recently developed a relatively strong research and development sector, with 14 750 employees.

	Brain business jobs per capita
Copenhagen	**20.8%**
Midtjylland	**9.0%**
Nordjylland	**5.9%**
Syddanmark	**5.7%**
Sjælland	**4.3%**


Denmark
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
0.0
0.5
1.0
1.5
2.0
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3.0
3.5
4.0

Netherlands

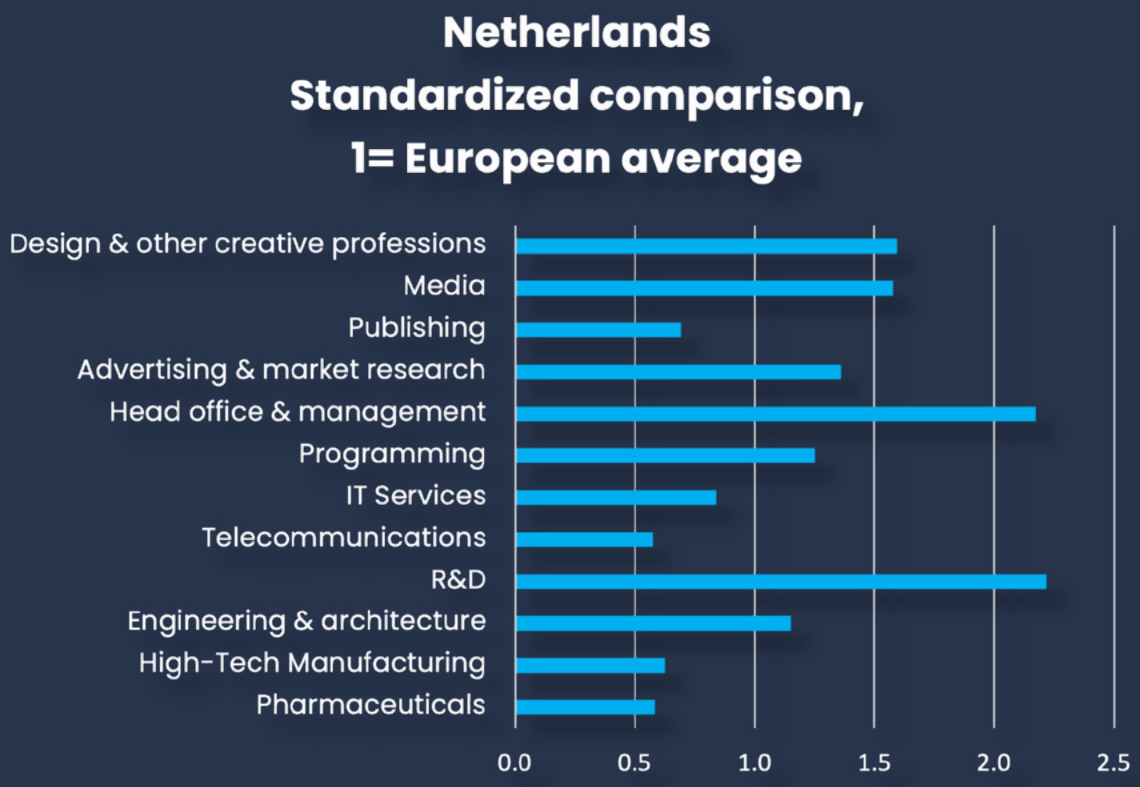
- In 2025, 9.8 percent of the working-age adults of the Netherlands were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is the same as the previous year, showing short-term stagnation. The share has risen since 2014 from 7.8 percent of the adults. The Netherlands is now the country in Europe with fifth-highest concentration of knowledge-intensive jobs.

- Amongst the total population of the Netherlands, 12.5 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Netherlands underperforms, having a 0.3 percentage points lower share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Amsterdam region fully 15.3 percent of the adults are employed in brain business jobs. The share is also high in the Utrecht region, 14.7 percent. In Limburg 11.3 percent of adults work in brain business jobs.

- The Netherlands has particular relative strengths in head office & management sector, where 264 650 are employed. The country also has a strong research & development sector, where 49 600 are employed.

	Brain business jobs per capita
Amsterdam	**15.3%**
Utrecht	**14.7%**
Limburg (NL)	**11.3%**
Noord-Brabant	**9.5%**
Zuid-Holland	**8.9%**
Gelderland	**8.0%**
Overijssel	**7.7%**
Groningen	**6.7%**
Flevoland	**6.5%**
Friesland (NL)	**5.1%**
Drenthe	**4.9%**
Zeeland	**4.0%**


Netherlands
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
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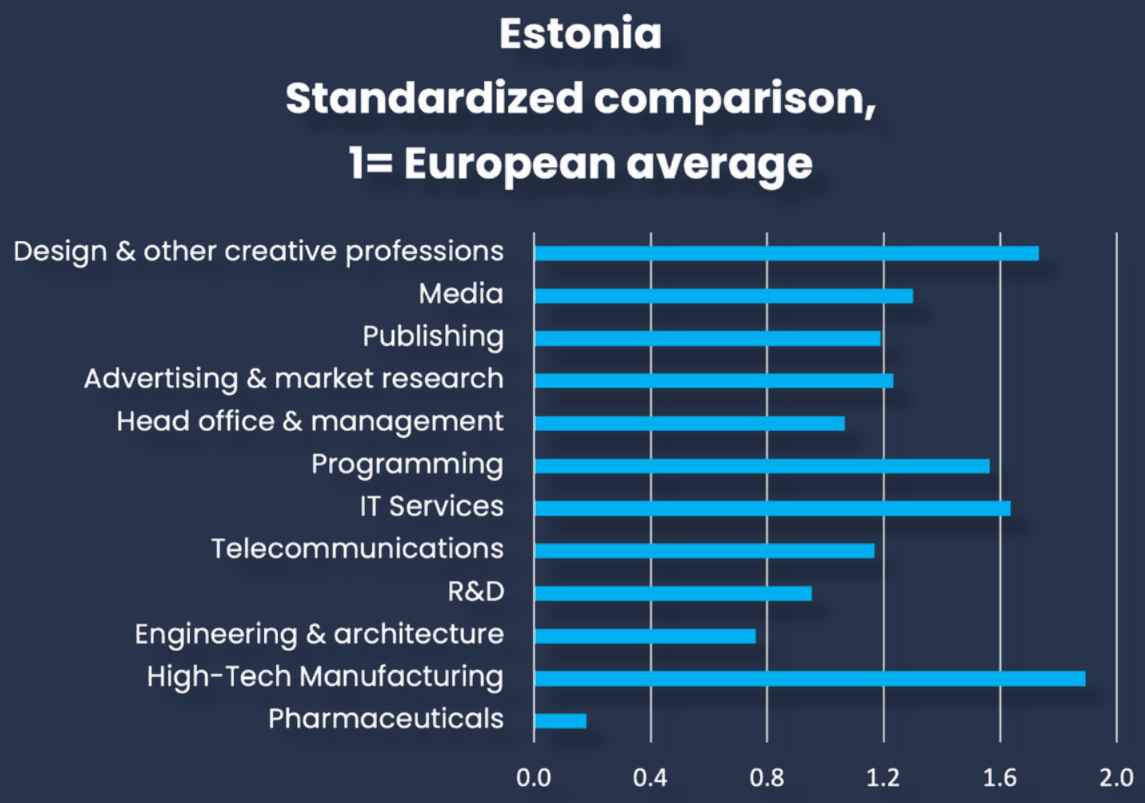
0.5
1.0
1.5
2.0
2.5

Estonia

- In 2025, 9.4 percent of the working-age adults of Estonia were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is an increase from 9.1 percent the previous year. The level now is somewhat higher than 9.0 percent in 2014. Estonia has the sixth-highest share of brain business jobs in Europe, the highest one of the Central European countries.
- Amongst the total population of the Estonia, 9.2 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Estonia overperforms, having a 1.3 percentage points higher share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.
- Estonia has particular relative strengths in high-tech manufacturing, where 6 250 are employed. The country has also recently developed a relatively strong IT services sector, with 3 900 employees.


Estonia
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
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0.4
0.8
1.2
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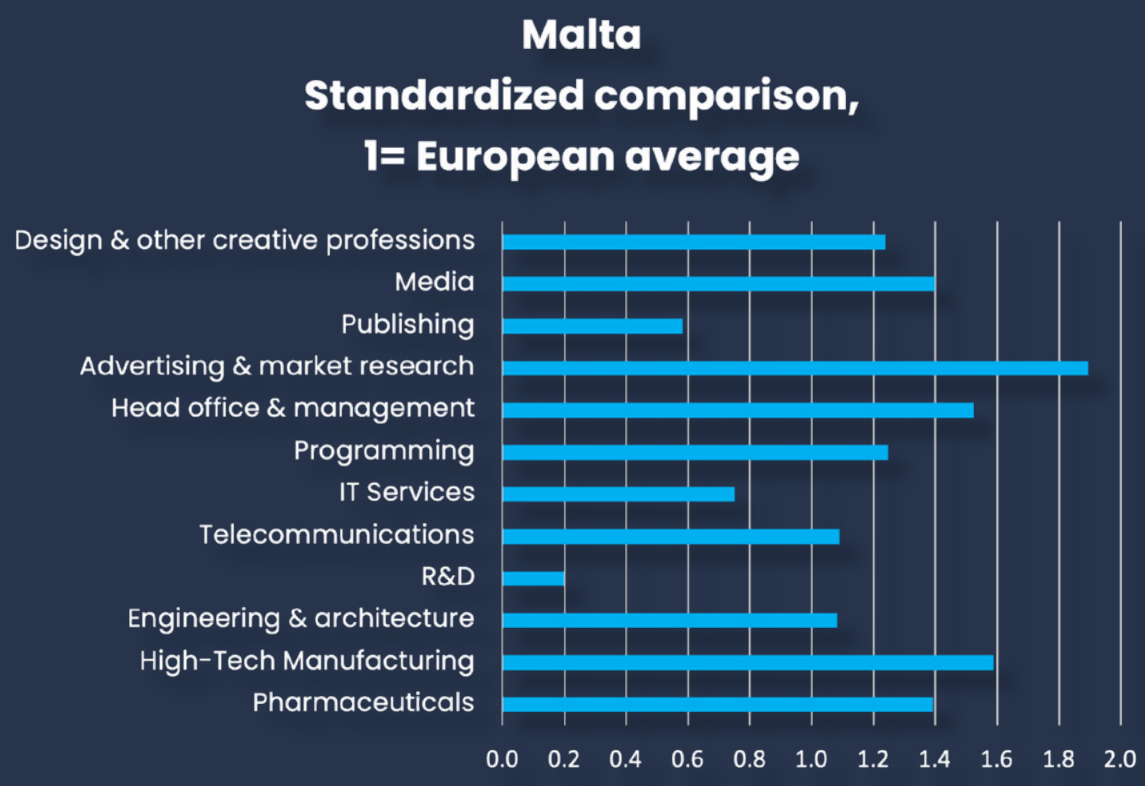
Malta

- In 2025, 9.4 percent of the working-age adults of Malta were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is a major improvement from 8.1 percent three years before, however slightly lower than 9.5 percent in 2024. Malta is now the country in Europe with seventh-highest concentration of knowledge-intensive jobs, and the top country in the Southern European region.

- Amongst the total population of the Malta, 8.7 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Malta overperforms, having a 1.6 percentage points higher share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- Malta has particular relative strengths in head office and management, 6 450 are employed. The country has also recently developed a relatively strong high-tech manufacturing sector, by attracting advanced electronic producers, with 2 550 employees in this knowledge-intensive industry.


Malta
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
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Slovenia

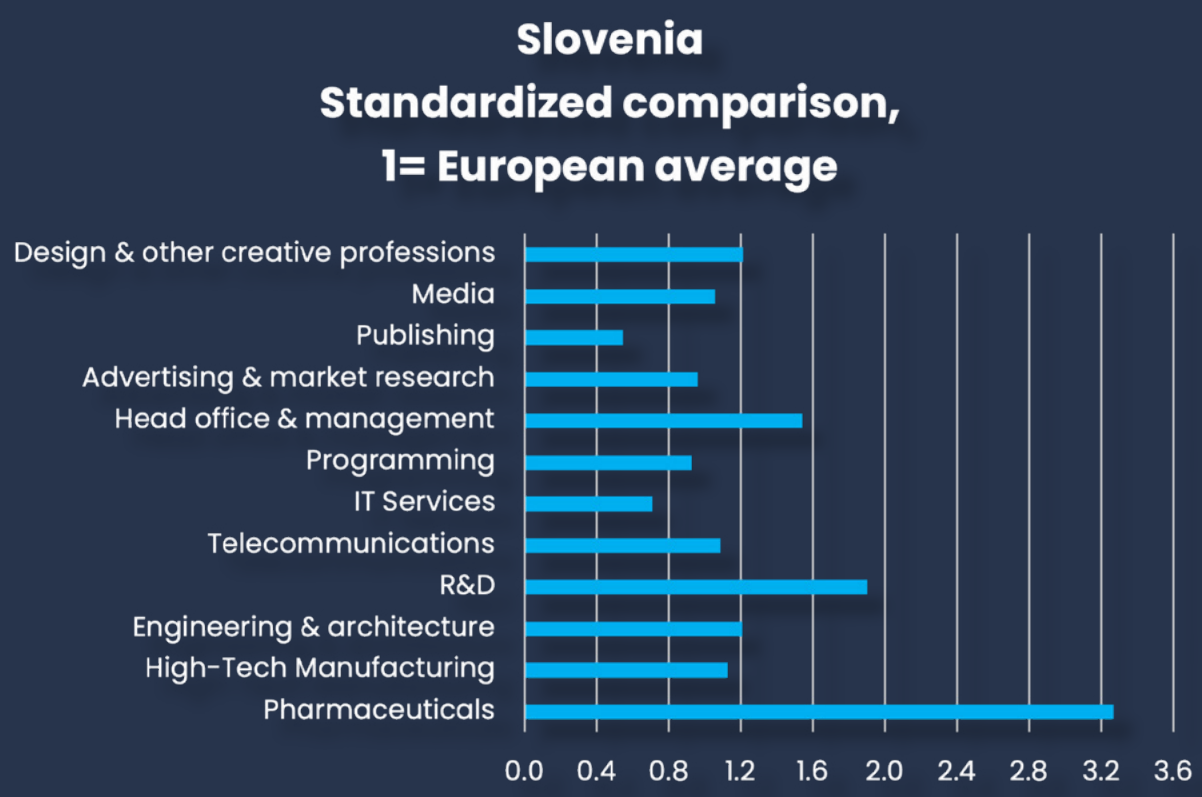
- In 2025, 9,2 percent of the working-age adults of Slovenia were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is a significant improvement from 8.6 percent the year before. The level has grown from 5.4 percent in 2014. Slovenia has the eight-highest share of brain business jobs in Europe.

- Amongst the total population of the Slovenia, 8.3 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Slovenia overperforms, having a 1.6 percentage points higher share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Ljubljana capital region, fully 11.8 percent of adults are employed in brain business jobs. This is significantly higher than 6.7 percent in the Vzhodna Slovenija region.

- Slovenia has particular relative strengths in pharmaceuticals, where 12 300 are employed. The country has also recently developed a relatively strong research & development sector, with 4 950 employees.

	Brain business jobs per capita
Ljubljana	**11.8%**
Vzhodna Slovenija	**6.7%**


Slovenia
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Design & other creative professions
Media
Publishing
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Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
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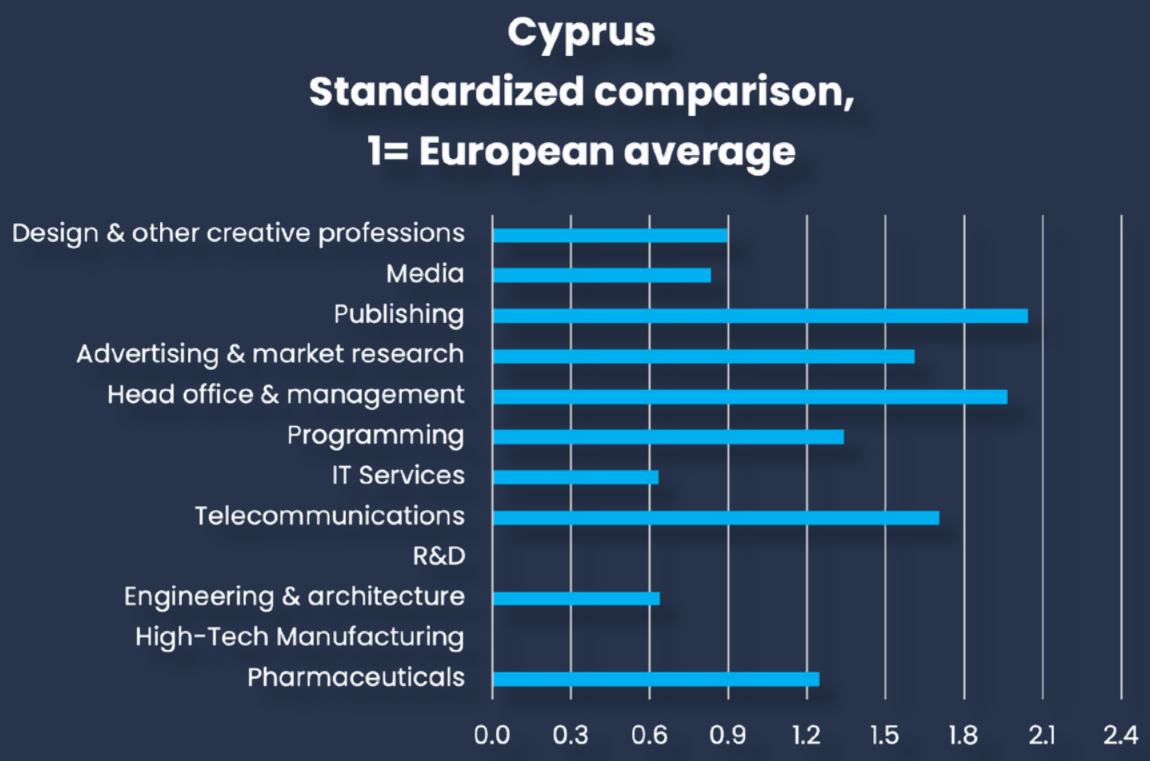
3.2
3.6

Cyprus

- In 2025, 9.0 percent of the working-age adults of Cyprus were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is a significant growth from 8.2 percent the year before. The level has increased from 3.8 percent in 2014, an astonishing rate of growth. Cyprus is the European countries with the ninth-highest share of brain business jobs in Europe.

- Amongst the total population of the Cyprus, 8.5 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Cyprus overperforms, having a 1.3 percentage points higher share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- Cyprus has particular relative strengths in head office and management, where 13 450 are employed. The country has also recently developed a relatively strong telecommunications sector, with 4 250 employees.


Cyprus
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
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2.4

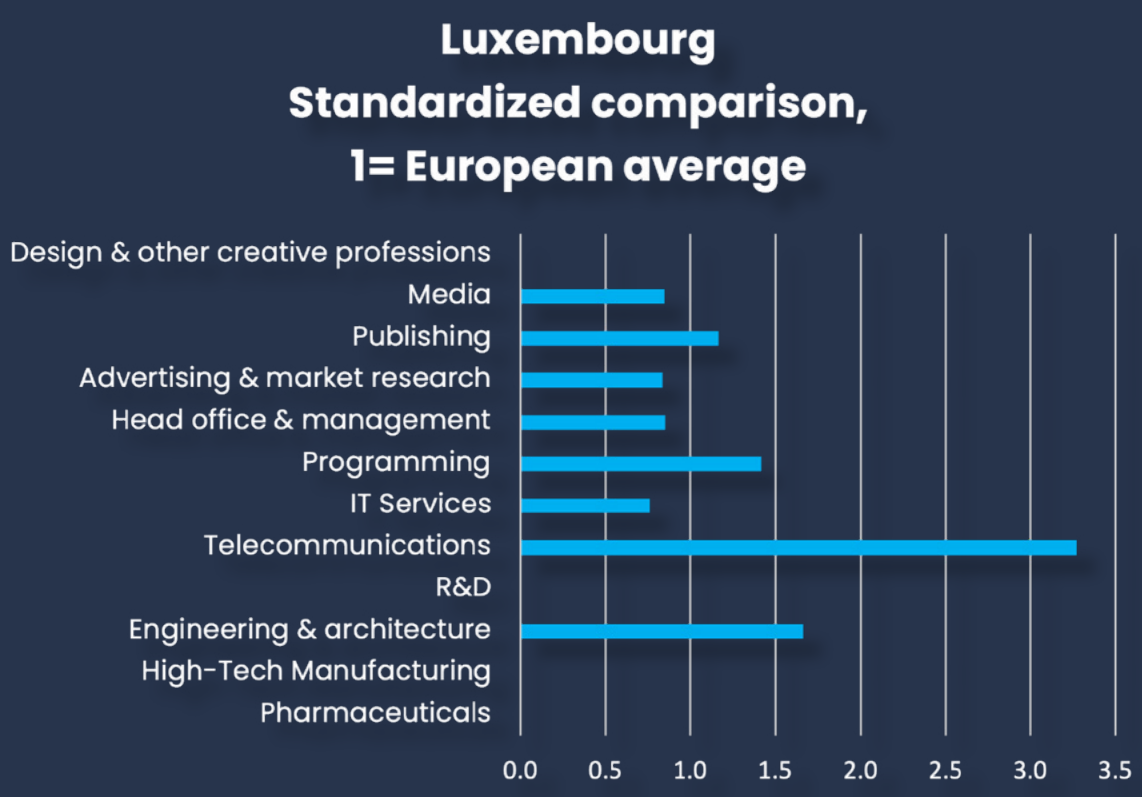
Luxembourg

- In 2025, 8.4 percent of the working-age adults of Luxembourg were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is a reduction from 8.5 percent the year before. The level has increased from 8.2 percent in 2014. Luxembourg is the European countries with the tenth-highest share of brain business jobs in Europe yet stagnating due to high costs.

- Amongst the total population of the Luxembourg, 10.8 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Luxembourg underperforms, having a 0.7 percentage points lower share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- Of adults in the Luxembourg, 19.7 percent are employed in manufacturing industries, while 20.8 percent are employed in professional services. Together with those employed in brain business jobs, in total 48.9 percent of adults are employed in high value creating sectors. Employment in these parts of the economy tends to bring in export revenues and has high value production per employee. These jobs in turn tend to stimulate economic activity in the rest of the economy.

- Luxembourg has particular relative strengths in telecommunications, where nearly 5 950 are employed. The country has recently developed a relatively strong engineering & architecture sector, with 9 350 employees.


Luxembourg
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
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Germany

- In 2025, 8.3 percent of the working-age adults of Germany were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is a reduction from 8.7 percent three years before, and the same as last year. The level has increased from 6.8 percent in 2014.

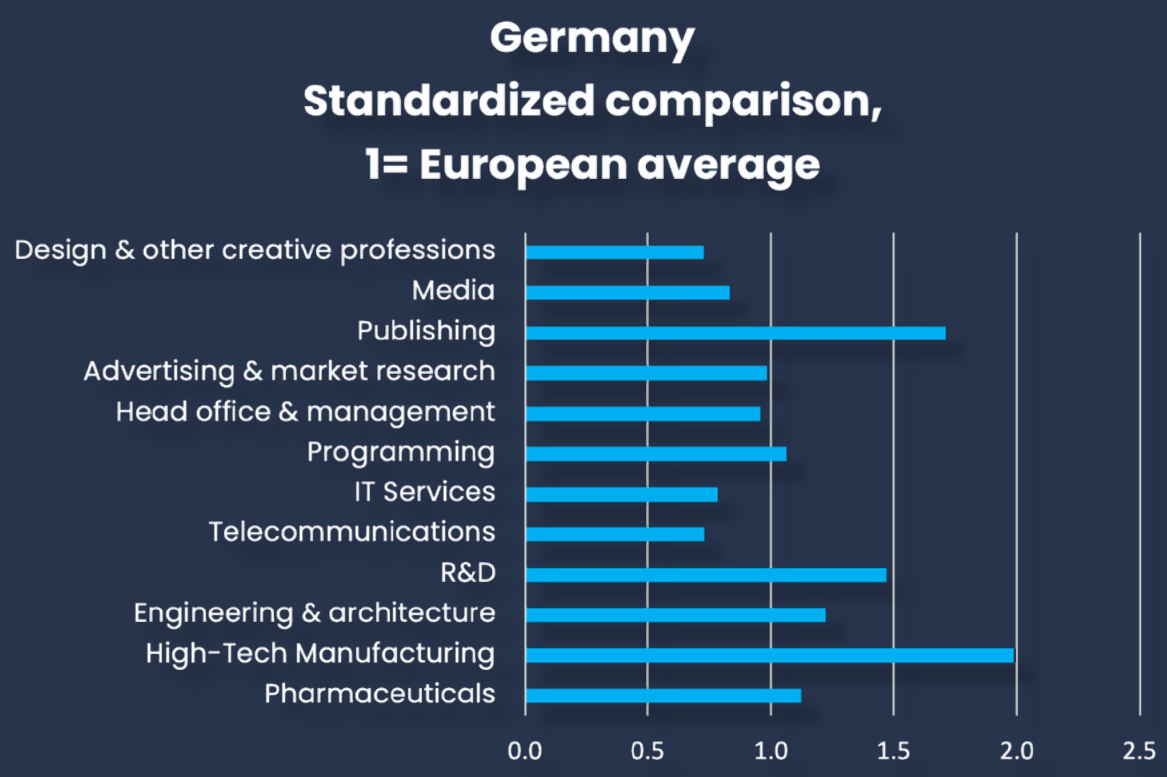
- Amongst the total population of the Germany, 8.5 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Germany overperforms, having a 0.6 percentage points higher share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Hamburg region fully 17.5 percent of the adults are employed in brain business jobs, this is the 11th highest share in a regional comparison, with all European regions that data exists for. The share is also high in Oberbayern and Berlin, 16.2 and 15.9 percent, respectively. Berlin is unique in Europe as a capital region, which has two other regions in the same country with higher shares of brain business jobs.

- Germany has particular relative strengths in high-tech manufacturing, where 422 500 are employed. The country has recently developed a relatively strong publishing sector, with above 260 650 employees.

	Brain business jobs per capita
Hamburg	17.5%
Oberbayern	16.2%
Berlin	15.9%
Darmstadt	12.5%
Mittelfranken	10.9%
Karlsruhe	10.9%
Stuttgart	10.6%
Köln	10.4%
Tübingen	10.0%
Bremen	9.5%
Dresden	8.4%
Düsseldorf	8.0%
Leipzig	7.7%
Freiburg	7.3%
Oberpfalz	7.2%
Braunschweig	7.1%
Hannover	6.8%
Rheinhessen-Pfalz	6.7%
Unterfranken	6.5%
Detmold	6.2%
Saarland	6.1%
Arnsberg	6.0%
Oberfranken	5.9%
Schwaben	5.9%

	Brain business jobs per capita
Thüringen	5.6%
Gießen	5.5%
Schleswig-Holstein	5.4%
Münster	5.4%
Kassel	5.1%
Niederbayern	5.0%
Koblenz	4.9%
Chemnitz	4.9%
Weser-Ems	4.7%
Brandenburg	3.8%
Sachsen-Anhalt	3.8%
Mecklenburg-Vorpommern	3.5%
Lüneburg	3.5%
Trier	2.9%


Germany
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
0.0
0.5
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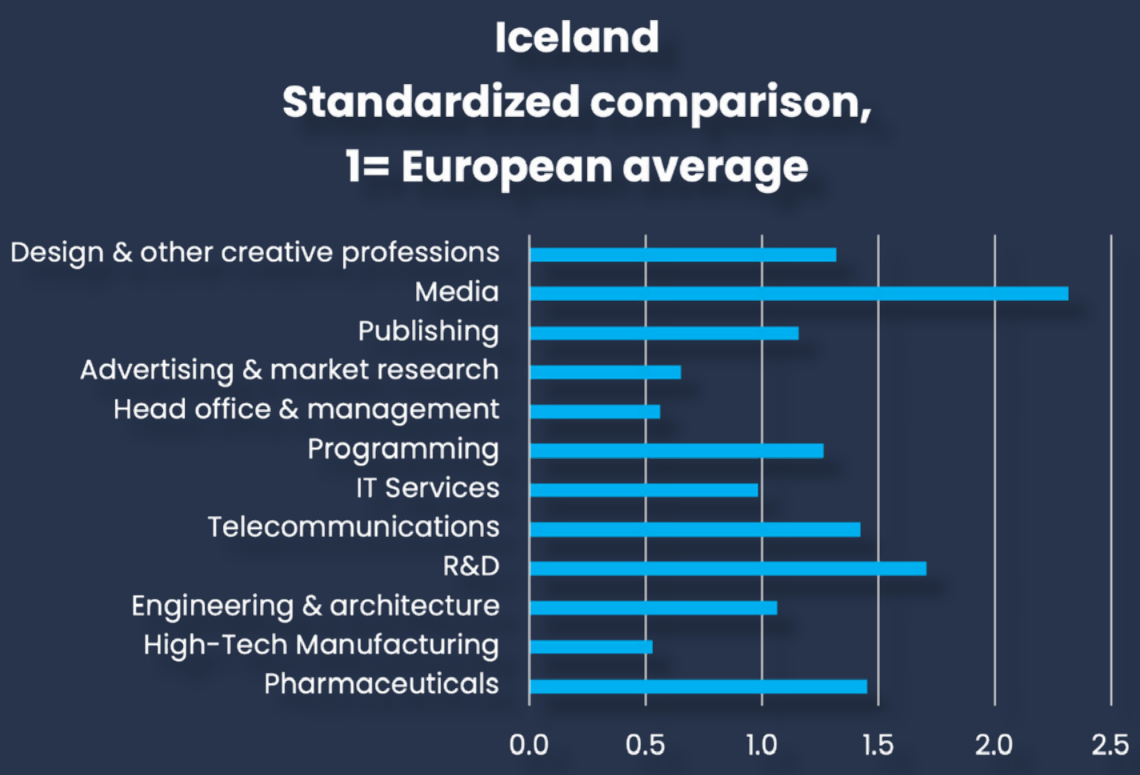
Iceland

- In 2025, 8.2 percent of the working-age adults of Iceland were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is a decrease from 8.4 percent the year before. The level has increased from 7.8 percent in 2014.

- Amongst the total population of the Iceland, 11.2 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Iceland underperforms, having a 1.1 percentage points lower share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- Iceland has particular relative strengths in media, where nearly 1 050 are employed. The country has also recently developed a relatively strong research & development sector, with 850 employees.


Iceland
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Media
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Advertising & market research
Head office & management
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R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
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Lithuania

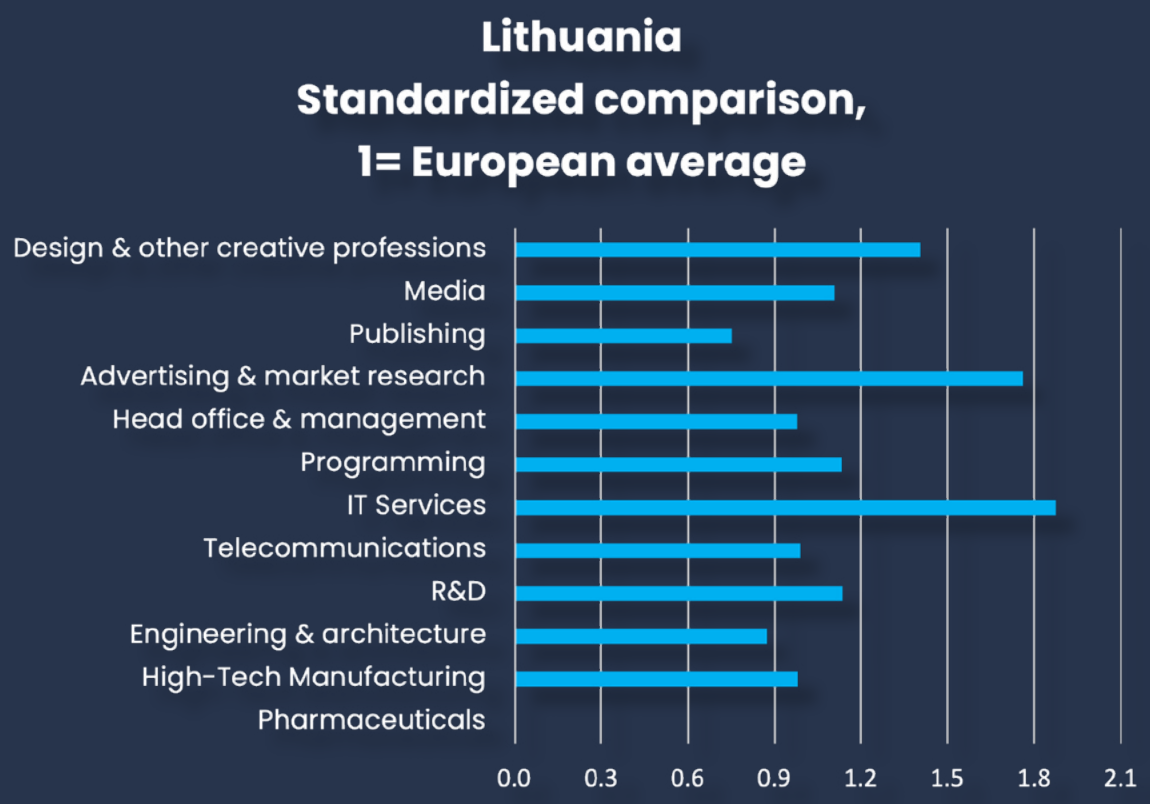
- In 2025, 8.1 percent of the working-age adults of Lithuania were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is an increase from 7.7 percent the year before. The level has risen from 4.3 percent in 2014, a significant improvement over time.

- Amongst the total population of the Lithuania, 9.0 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Lithuania slightly overperforms, having a 0.1 percentage points lower share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Vilnius region fully 15.5 percent of the adults are employed in brain business jobs. This is considerably higher than 3.6 percent in the Vidurio region.

- Lithuania has particular relative strengths in IT services, where nearly 9 750 are employed. The country has also recently developed a relatively strong advertising and market research sector, with above 13 850 employees.

	Brain business jobs per capita
Vilnius	**15.5%**
Vidurio	**3.6%**


Lithuania
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Design & other creative professions
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Publishing
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IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
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Finland

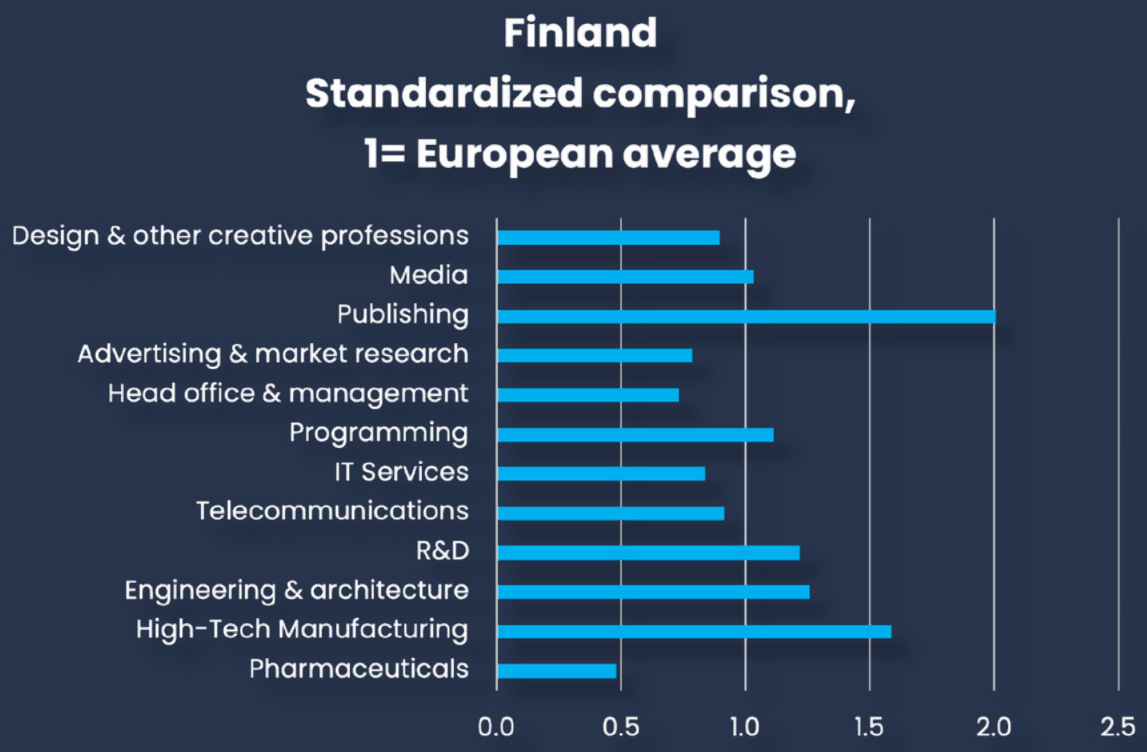
- In 2025, 8.0 percent of the working-age adults of Finland were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is an increase from 7.8 the year before. The level has risen from 6.8 percent in 2014.

- Amongst the total population of the Finland, 10.3 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Finland underperforms, having a 0.8 percentage points lower share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Helsinki region fully 13.9 percent of the adults are employed in brain business jobs. The share is also high in the Länsi-Suomi and Åland regions, 6.0 and 5.5 percent, respectively.

- Finland has particular relative strengths in high-tech manufacturing, where nearly 21 450 are employed. The country has also recently developed a relatively strong publishing sector, with 19 450 employees.

	Brain business jobs per capita
Helsinki	**13.9%**
Länsi-Suomi	**6.0%**
Åland	**5.5%**
Pohjois- ja Itä-Suomi	**5.2%**
Etelä-Suomi	**4.8%**


Finland
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Design & other creative professions
Media
Publishing
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Head office & management
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R&D
Engineering & architecture
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Pharmaceuticals
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Hungary

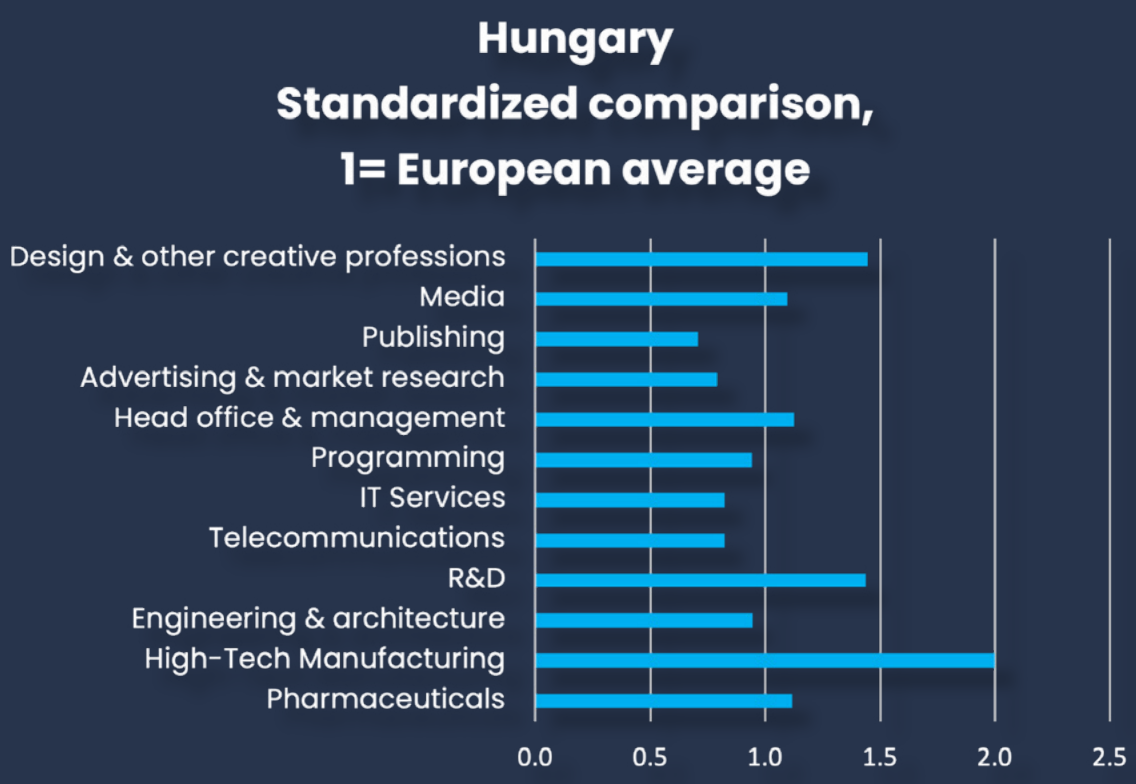
- In 2025, 8.0 percent of the working-age adults of Hungary were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is a gradual decline from 8.4 percent two years before. The level has risen from 5.3 percent in 2014, a significant rate of growth, yet followed by stagnation lately.

- Amongst the total population of the Hungary, 6.7 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Hungary overperforms, having a 1.4 percentage points higher share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Budapest region 22.1 percent of the adults are employed in brain business jobs. This is the third highest share in a regional comparison, with all European regions that data exists for. The share is also high in the Pest region, 6.5 percent.

- Hungary has particular relative strengths in high-tech manufacturing, where 48 800 are employed. The country has also recently developed a relatively strong design and other creative professions sector, with close to 42 800 employees.

	Brain business jobs per capita
Budapest	**22.1%**
Pest	**6.5%**
Közép-Dunántúl	**5.5%**
Nyugat-Dunántúl	**4.9%**
Dél-Dunántúl	**4.7%**
Észak-Alföld	**4.3%**
Észak-Magyarország	**4.3%**
Dél-Alföld	**4.0%**


Hungary
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Pharmaceuticals
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Norway

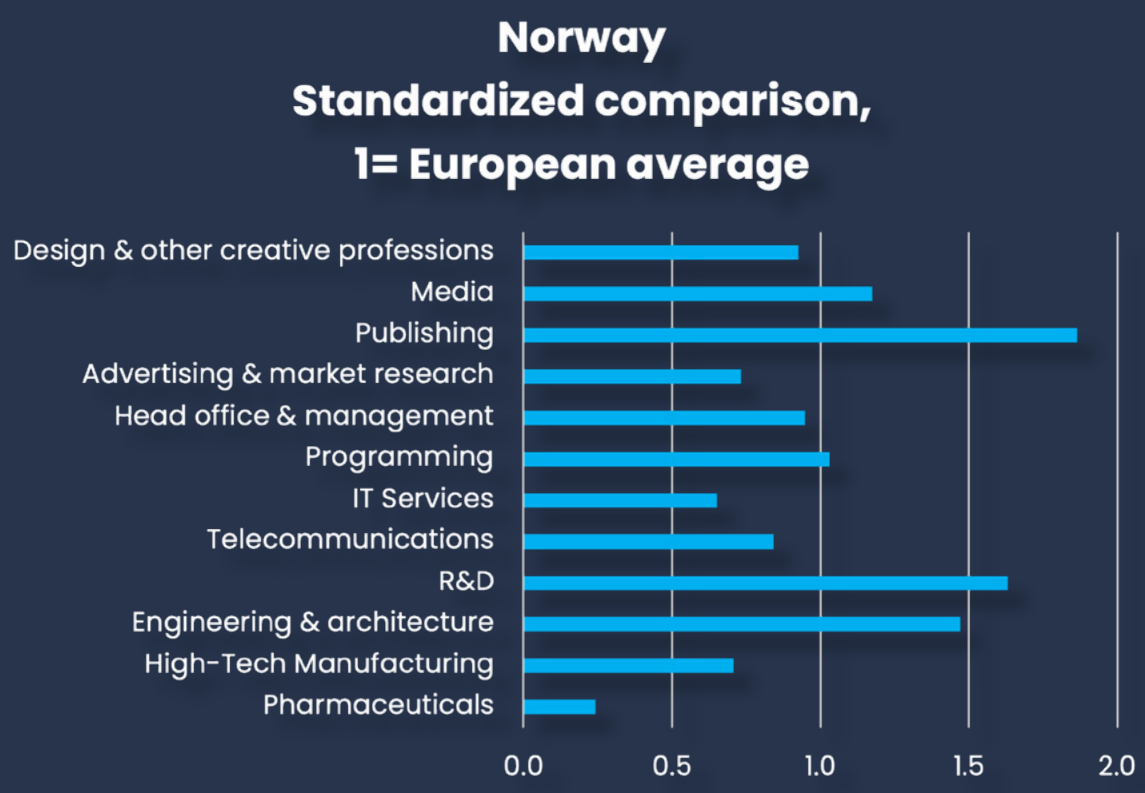
- In 2025, 7.9 percent of the working-age adults of Norway were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is a significant growth from 7.0 percent in 2022, yet less than 8.1 percent in 2024. The level has risen from 6.5 percent in 2014.

- Amongst the total population of the Norway, 11.4 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Norway underperforms, having a 1.6 percentage points lower share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Oslo region 12.2 percent of the adults are employed in brain business jobs. The share is also high in the Trøndelag region, where 7.4 percent are employed in brain business jobs.

- Norway has particular relative strengths in engineering and architecture, where nearly 62 300 are employed. The country has also recently developed a relatively strong research & development sector, with 11 300 employees.

	Brain business jobs per capita
Oslo	**12.2%**
Trøndelag	**7.4%**
Vestlandet	**6.1%**
Agder og Sør-Østlandet	**5.2%**
Nord-Norge	**3.5%**
Innlandet	**3.4%**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Pharmaceuticals
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2.0

Portugal

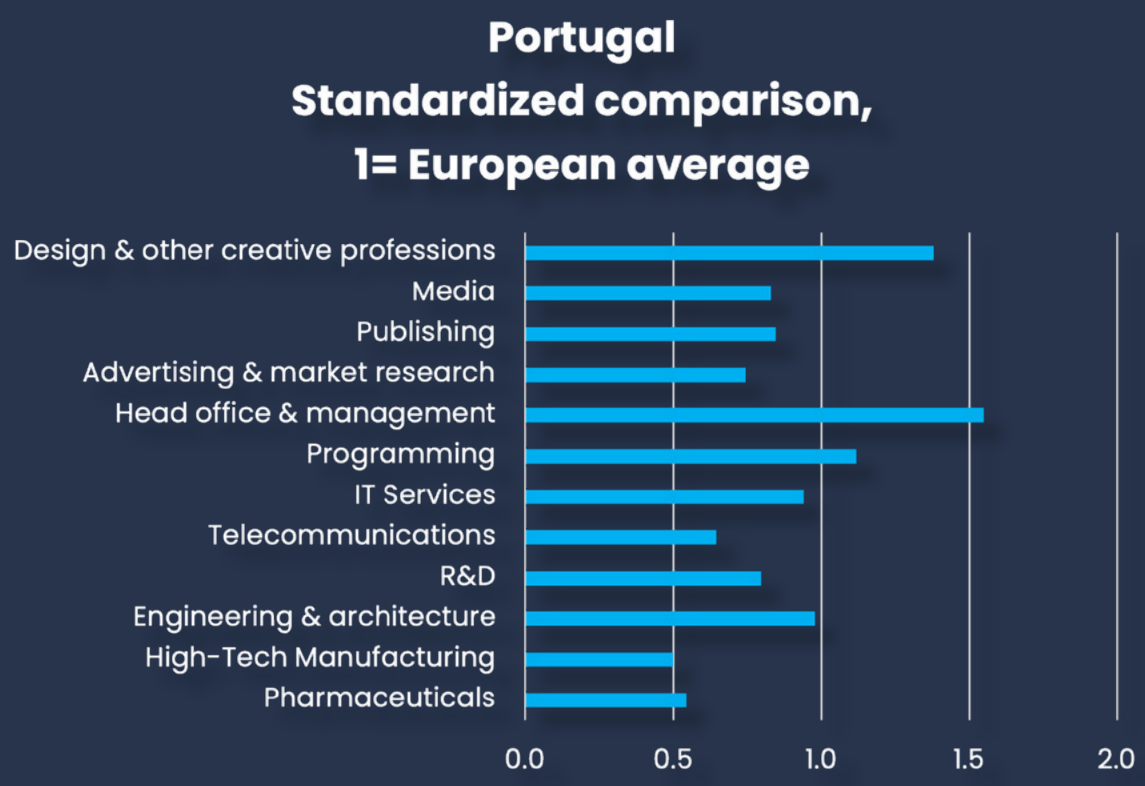
- In 2025, 7.8 percent of the working-age adults of Portugal were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is an increase from 7.6 percent the year before. The level has risen from 3.8 percent in 2014, a significant improvement over time.

- Amongst the total population of the Portugal, 9.1 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Portugal underperforms, having a 0.3 percentage points lower share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Lisbon region 14.2 percent of the adults are employed in brain business jobs. The Norte region also has a high share of brain business jobs per capita, 6.6 percent.

- Portugal has particular relative strengths in head office and management, where nearly 108 800 are employed. The country has also recently developed a relatively strong design and other creative professions sector, with 42 400 employees.

	Brain business jobs per capita
Lisbon	**14.2%**
Norte	**6.6%**
Região Autónoma da Madeira	**4.8%**
Centro	**4.2%**
Alentejo	**4.1%**
Algarve	**3.8%**
Região Autónoma dos Açores	**3.0%**


Portugal
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
0.0
0.5
1.0
1.5
2.0

Czechia

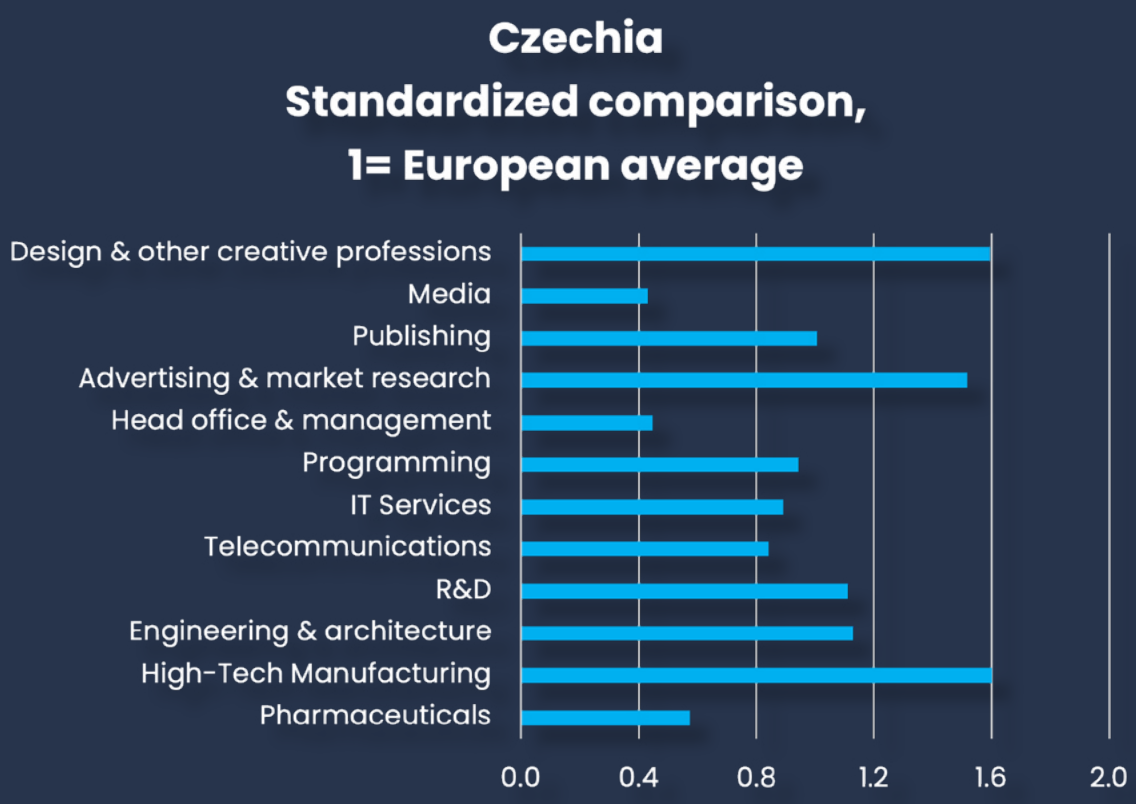
- In 2025, 7.5 percent of the working-age adults of Czechia were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is an increase from 7.0 percent two years before. The level has risen from 5.3 percent in 2014, a major economic transformation.

- Amongst the total population of the Czechia, 7.2 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Czechia overperforms, having a 0.5 percentage points higher share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Prague region as many as 23.8 percent of the adults are employed in brain business jobs, this is the 2nd highest share in a regional comparison, with all European regions that data exists for. Jihovýchod also has a high shares of brain business jobs per capita, 8.1 percent.

- Czechia has particular relative strengths in high-tech manufacturing, with some 43 450 jobs in this sector, as well as in design & other creative professions, where 52 500 are employed.

	Brain business jobs per capita
Prague	**23.8%**
Jihovýchod	**8.1%**
Severovýchod	**5.4%**
Moravskoslezsko	**5.3%**
Střední Morava	**4.6%**
Jihozápad	**4.2%**
Střední Čechy	**4.1%**
Severozápad	**2.7%**


Czechia
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
0.0
0.4
0.8
1.2
1.6
2.0

Belgium

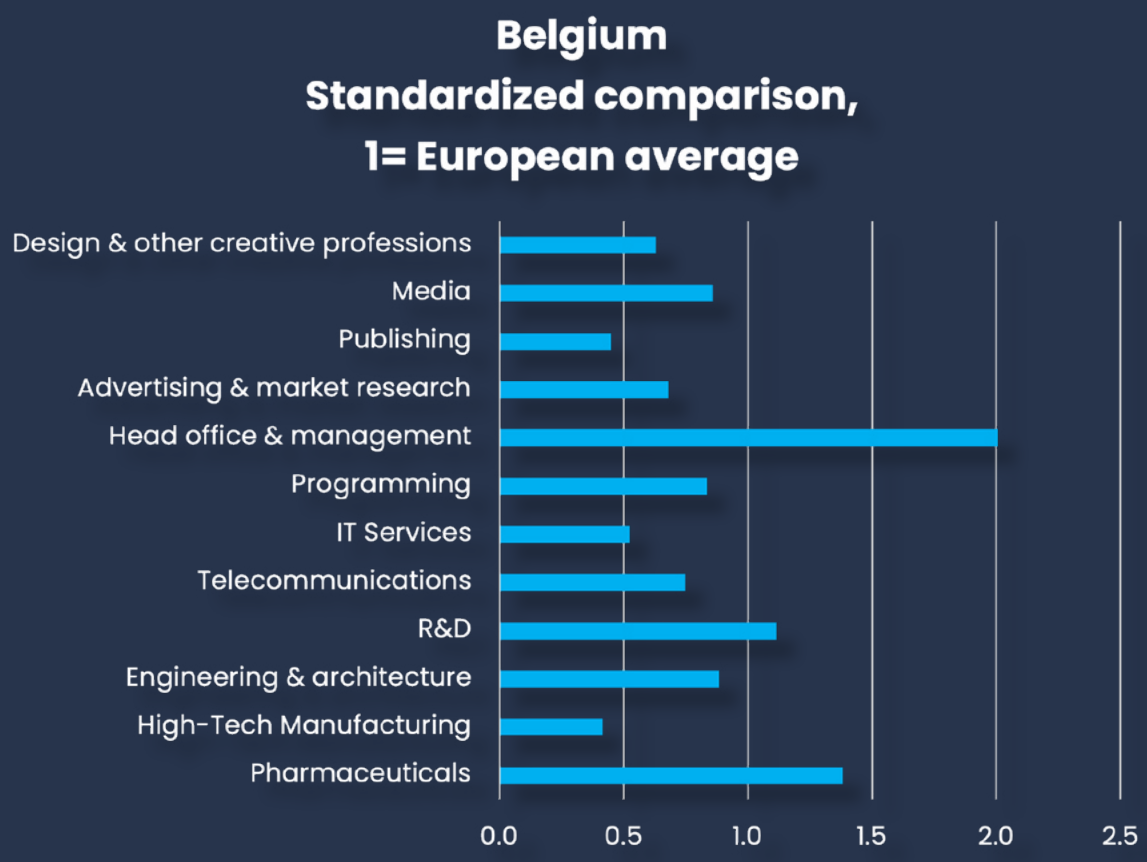
- In 2025, 7.3 percent of the working-age adults of Belgium were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is a slight decline from 7.5 percent the previous year. The level has risen from 5.7 percent in 2014.

- Amongst the total population of the Belgium, 9.1 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Belgium underperforms, having a 0.7 percentage points lower share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Brabant waloon region as many as 19.2 percent of the adults are employed in brain business jobs, this is the 7th highest share in a regional comparison, with all European regions that data exists for. In the capital region of Brussels, 12.5 percent are employed in brain business jobs. Vlaams-Brabant also has a high share, 10.5 percent.

- Belgium has particular relative strengths in head office and management, with some 157 000 jobs in this sector, as well as in pharmaceuticals, where 28 850 are employed.

	Brain business jobs per capita
Brabant wallon	**19.2%**
Brussels	**12.5%**
Vlaams-Brabant	**10.5%**
Antwerpen	**9.0%**
Oost-Vlaanderen	**7.1%**
West-Vlaanderen	**5.5%**
Limburg (BE)	**5.2%**
Liège	**3.9%**
Namur	**3.7%**
Hainaut	**2.8%**
Luxembourg (BE)	**1.3%**


Belgium
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
0.0
0.5
1.0
1.5
2.0
2.5

Austria

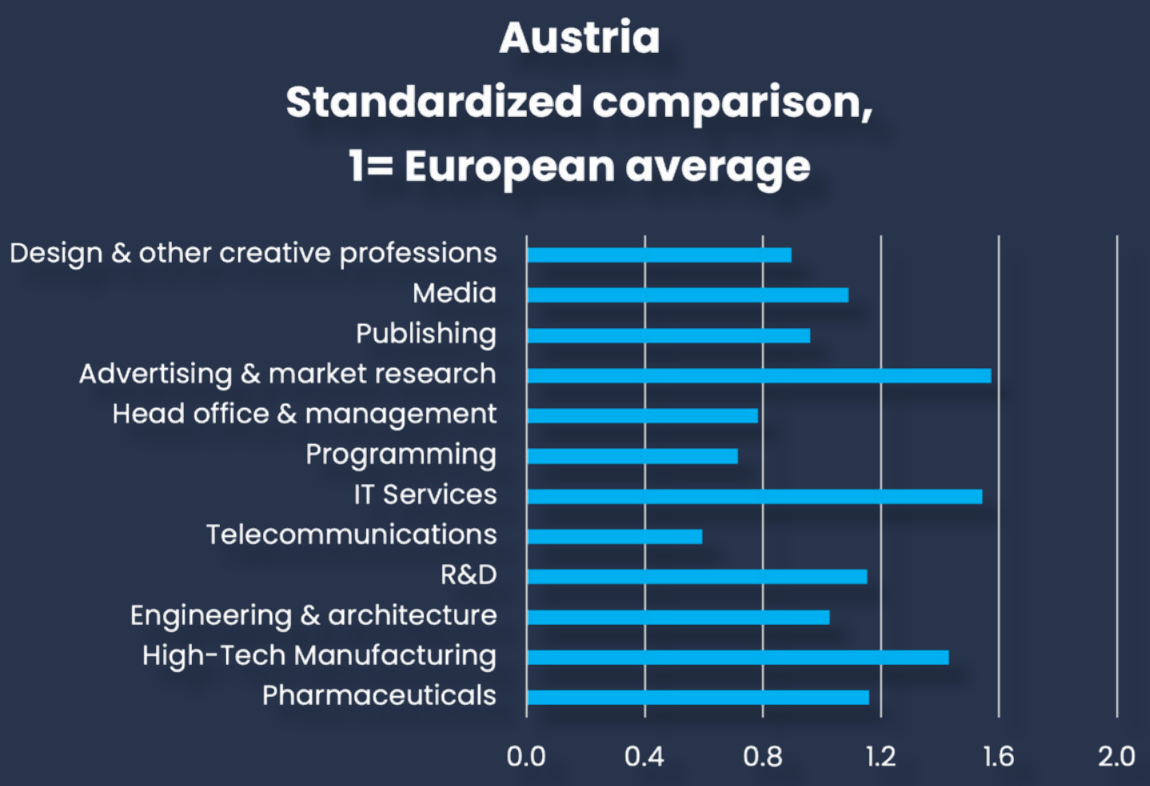
- In 2025, 7.2 percent of the working-age adults of Austria were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This decreased from 7.5 percent the year before. The level has risen from 6.0 percent in 2014.

- Amongst the total population of the Austria, 8.8 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Austria underperforms, having a 0.7 percentage points lower share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Vienna region as many as 12.6 percent of the adults are employed in brain business jobs. Steiermark and Tirol regions also have high shares of brain business jobs per capita, 7.4 and 7.2 percent, respectively.

- Austria has particular relative strengths in high-tech manufacturing, where 34 550 are employed. The country has also recently developed a relatively strong IT services sector, with 25 700 employees.

	Brain business jobs per capita
Vienna	**12.6%**
Steiermark	**7.4%**
Tirol	**7.2%**
Salzburg	**6.9%**
Kärnten	**6.1%**
Oberösterreich	**5.5%**
Vorarlberg	**4.6%**
Niederösterreich	**4.2%**
Burgenland	**3.5%**


Austria
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
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1.6
2.0

Bulgaria

- In 2025, 7.2 percent of the working-age adults of Bulgaria were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is a major increase from 6.1 percent two years before. The level has risen from 3.6 percent in 2014, significantly transforming the knowledge intensity of the economy.

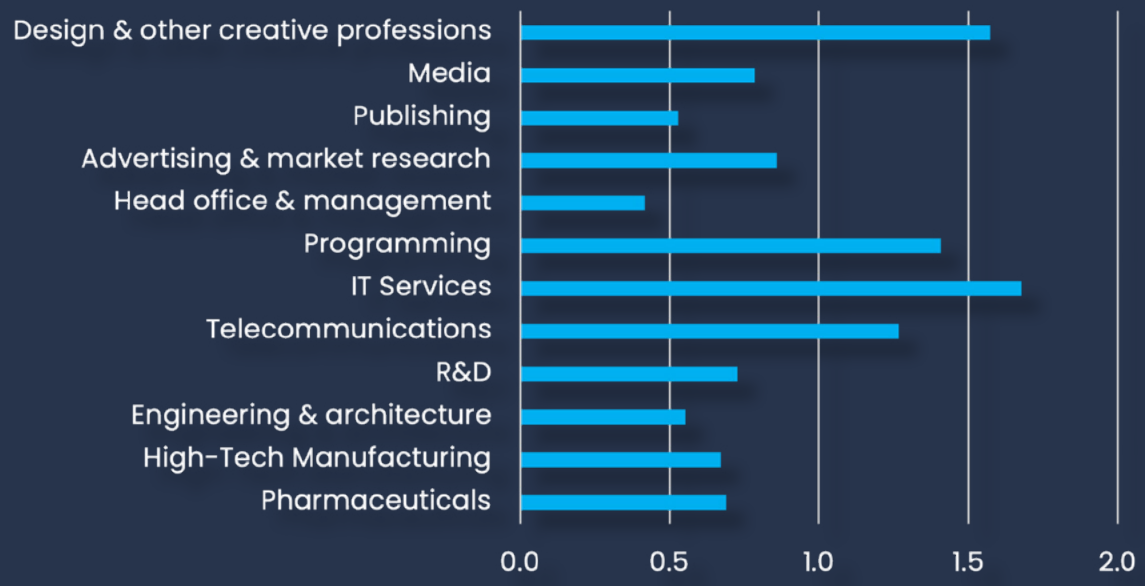
- Amongst the total population of the Bulgaria, 6.6 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Bulgaria overperforms, having a 0.6 percentage points higher share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Sofia region fully 17.3 percent of the adults are employed in brain business jobs, amongst the highest rate in Europe.

- Bulgaria has particular relative strengths in IT services, with some 17 750 jobs in this sector, as well as in design & other creative professions, where more than 29 250 are employed.

	Brain business jobs per capita
Sofia	**17.3%**
Severoiztochen	**3.8%**
Yuzhen tsentralen	**3.0%**
Severen tsentralen	**2.4%**
Yugoiztochen	**2.0%**
Severozapaden	**1.4%**

Bulgaria
Standardized comparison, 1= European average



Slovakia

- In 2025, 7.2 percent of the working-age adults of Slovakia were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is an increase from 6.7 percent the year before. The level has risen from 4.4 percent in 2014, which represents a significant economic shift.

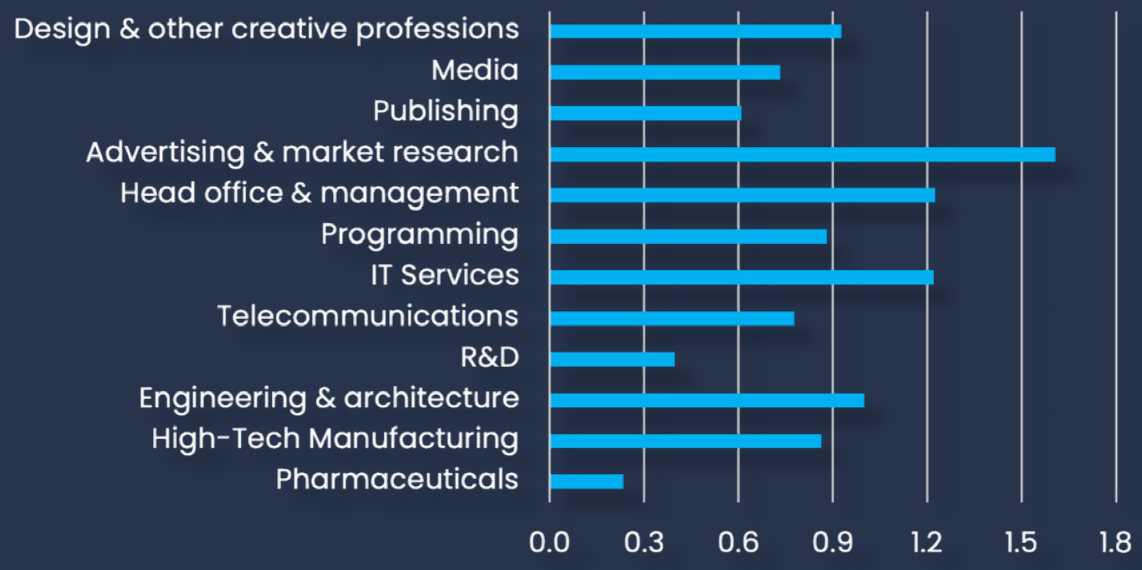
- Amongst the total population of the Slovakia, 5.9 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Slovakia overperforms, having a 1.0 percentage points higher share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Bratislava region as many as 24.5 percent of the adults are employed in brain business jobs, this is the highest share in a regional comparison, with all European regions that data exists for. Bratislava climbs again to the top position it had before, last year it was second in a regional comparison.

- Slovakia has particular relative strengths in head office & management, where 45 400 are employed. The country has also recently developed a relatively strong programming sector, with 57 300 employees.

	Brain business jobs per capita
Bratislava	**24.5%**
Západné Slovensko	**5.2%**
Stredné Slovensko	**4.5%**
Východné Slovensko	**3.7%**

Slovakia
Standardized comparison, 1= European average



Croatia

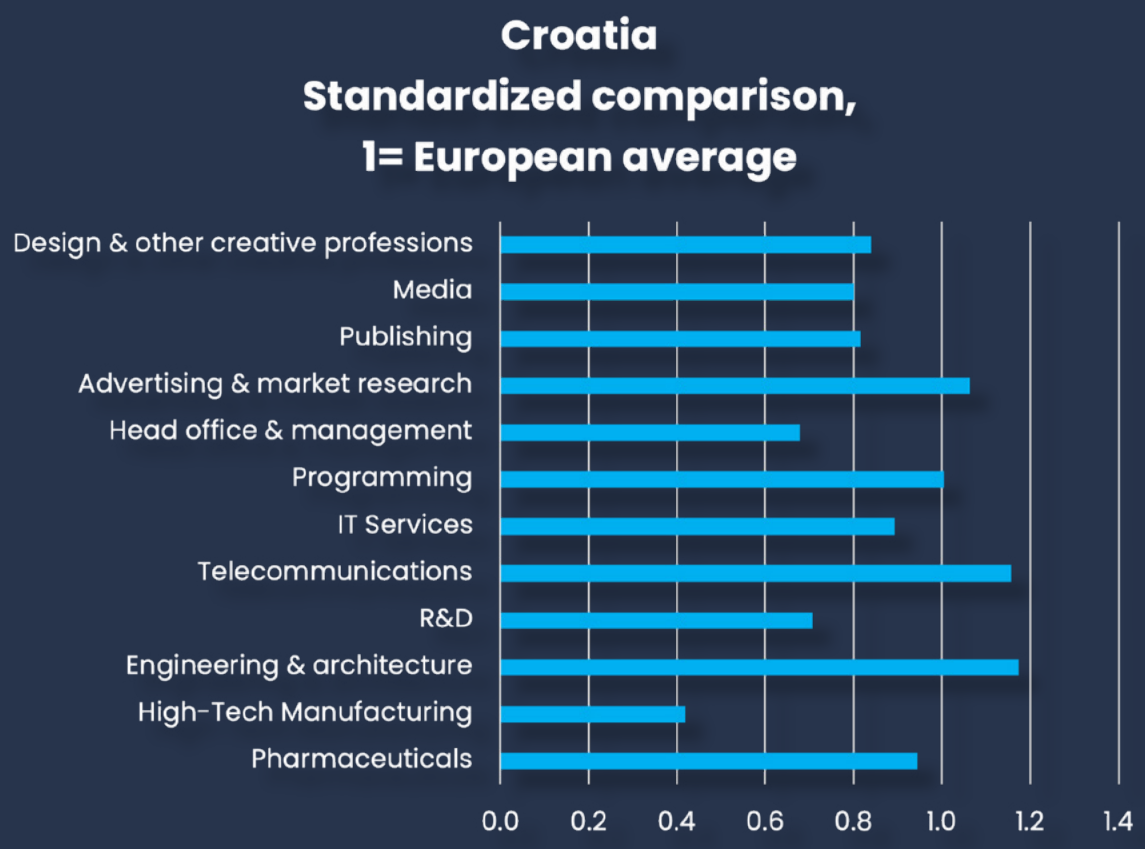
- In 2025, 7.0 percent of the working-age adults of Croatia were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is a major increase from 6.6 percent the year before. The level has risen from 3.7 percent in 2014, nearly doubling since.

- Amongst the total population of the Croatia, 5.9 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Croatia overperforms, having a 1.0 percentage points higher share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Zagreb region as many as 18.9 percent of the adults are employed in brain business jobs, this is the 8th highest share in a regional comparison, with all European regions that data exists for. Jadranska Hrvatska also has a relatively high share, 4.9 percent.

- Croatia has particular relative strengths in telecommunications, where 10 550 are employed. The country has recently developed a relatively strong engineering & architecture sector, with 33 300 employees.

	Brain business jobs per capita
Zagreb	**18.9%**
Jadranska Hrvatska	**4.9%**
Sjeverna Hrvatska	**3.8%**
Panonska Hrvatska	**3.0%**

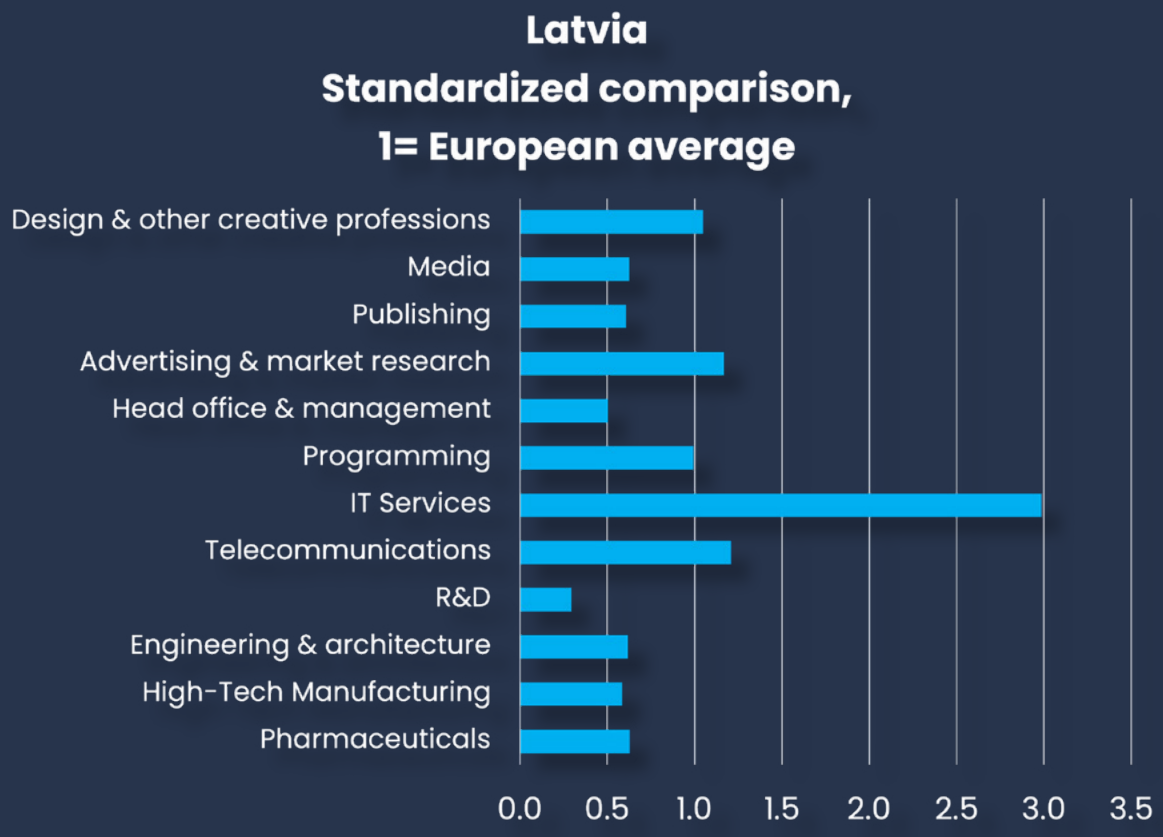

Croatia
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
0.0
0.2
0.4
0.6
0.8
1.0
1.2
1.4

Latvia

- In 2025, 6.6 percent of the working-age adults of Latvia were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is a decrease from 7.0 percent the year before. The level has risen from 4.8 percent in 2014, which represents a significant economic transformation.

- Amongst the total population of the Latvia, 7.2 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Latvia underperforms, having a 0.3 percentage points lower share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- Latvia has particular relative strengths in IT services, where 9 450 are employed. The country has also recently developed a relatively strong telecommunications sector, with 5 350 employees.


Latvia
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
0.0
0.5
1.0
1.5
2.0
2.5
3.0
3.5

France

- In 2025, 6.4 percent of the working-age adults of France were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is an increase from 6.0 percent three years before, and the same level as last year. The level has risen from 5.5 percent in 2014.

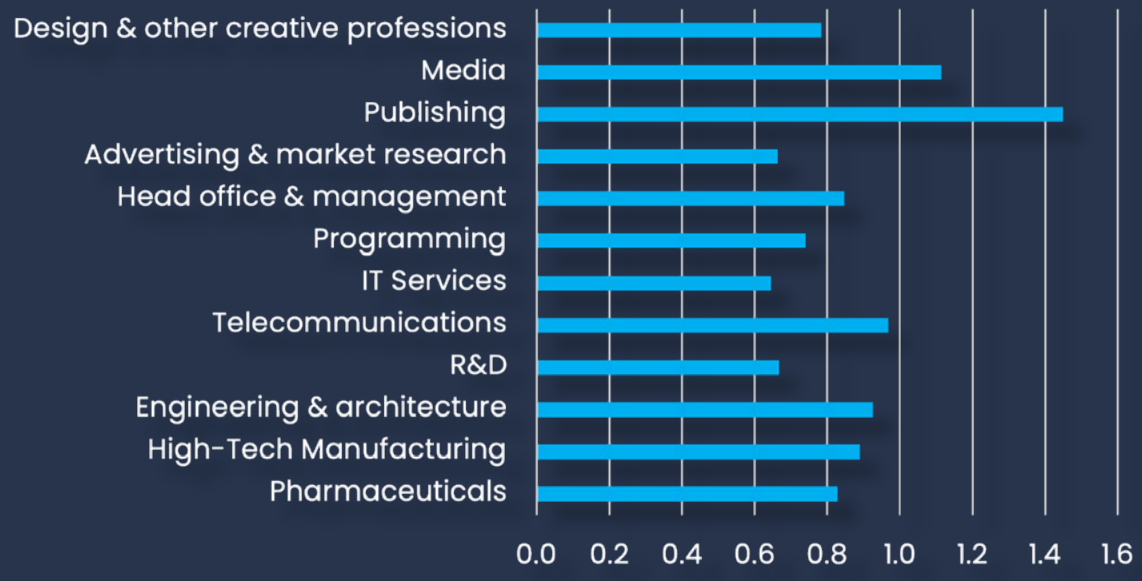
- Amongst the total population of the France, 8.3 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. France underperforms, having a 1.2 percentage points lower share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Paris region 14.4 percent of the adults are employed in brain business jobs. No other European region has as many brain business jobs in total. Rhône-Alpes and Midi-Pyrénées also have relatively high shares, 6.8 and 6.6 percent, respectively.

- France has particular relative strengths in publishing, where 170 150 are employed. The country has also recently developed a relatively strong pharmaceuticals sector, with 95 450 employees.

	Brain business jobs per capita
Paris	14.4%
Rhône-Alpes	6.8%
Midi-Pyrénées	6.6%
Provence-Alpes-Côte d'Azur	5.2%
Pays de la Loire	5.1%
Aquitaine	4.9%
Bretagne	4.5%
Alsace	4.5%
Nord-Pas de Calais	4.0%
Haute-Normandie	3.7%
Languedoc-Roussillon	3.7%
Auvergne	3.4%
Basse-Normandie	3.0%
Franche-Comté	2.6%
Poitou-Charentes	2.5%
Bourgogne	2.4%
Lorraine	2.3%
Champagne-Ardenne	2.3%
Limousin	2.3%
Picardie	2.2%
Corse	2.1%

France
Standardized comparison,
1= European average



Poland

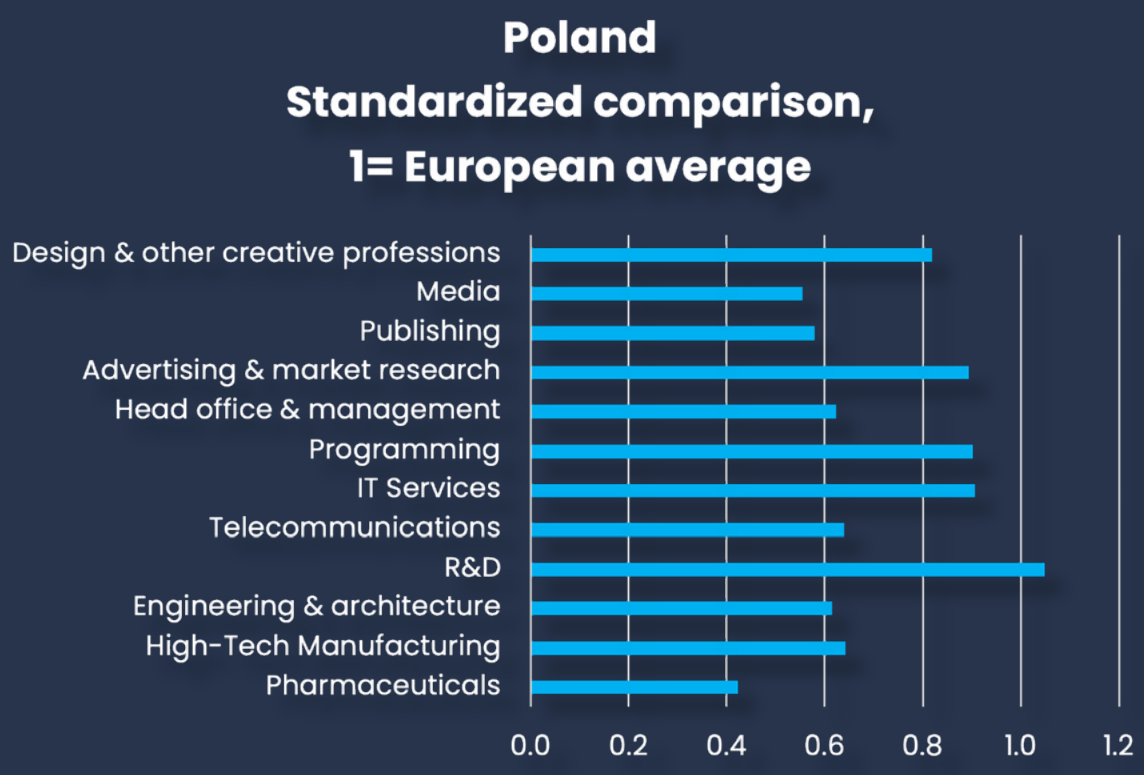
- In 2025, 5.6 percent of the working-age adults of Poland were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is an increase from 5.1 percent the year before. The level has risen from 3.1 percent in 2014.

- Amongst the total population of the Poland, 7.8 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Poland underperforms, having a 1.8 percentage points lower share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Warsaw region fully 18.1 percent of the adults are employed in brain business jobs, this is the 9th highest share in a regional comparison, with all European regions that data exists for. Malopolskie, Dolnoslaskie and Pomorskie regions also have a high share of brain business jobs per adult, with 8.0, 6.9 and 6.7 percent, respectively.

- Poland has particular relative strengths in research & development, where 47 050 are employed. The country also has recently developed a relatively strong programming sector, with 382 850 employees.

	Brain business jobs per capita
Warsaw	18.1%
Małopolskie	8.0%
Dolnośląskie	6.9%
Pomorskie	6.7%
Wielkopolskie	4.6%
Śląskie	4.5%
Łódzkie	4.1%
Kujawsko-pomorskie	3.4%
Zachodniopomorskie	3.0%
Podkarpackie	2.7%
Lubelskie	2.6%
Podlaskie	2.6%
Lubuskie	2.6%
Opolskie	2.2%
Świętokrzyskie	2.0%
Warmińsko-mazurskie	2.0%
Mazowiecki regionalny	2.0%


Poland
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
0.0
0.2
0.4
0.6
0.8
1.0
1.2

Italy

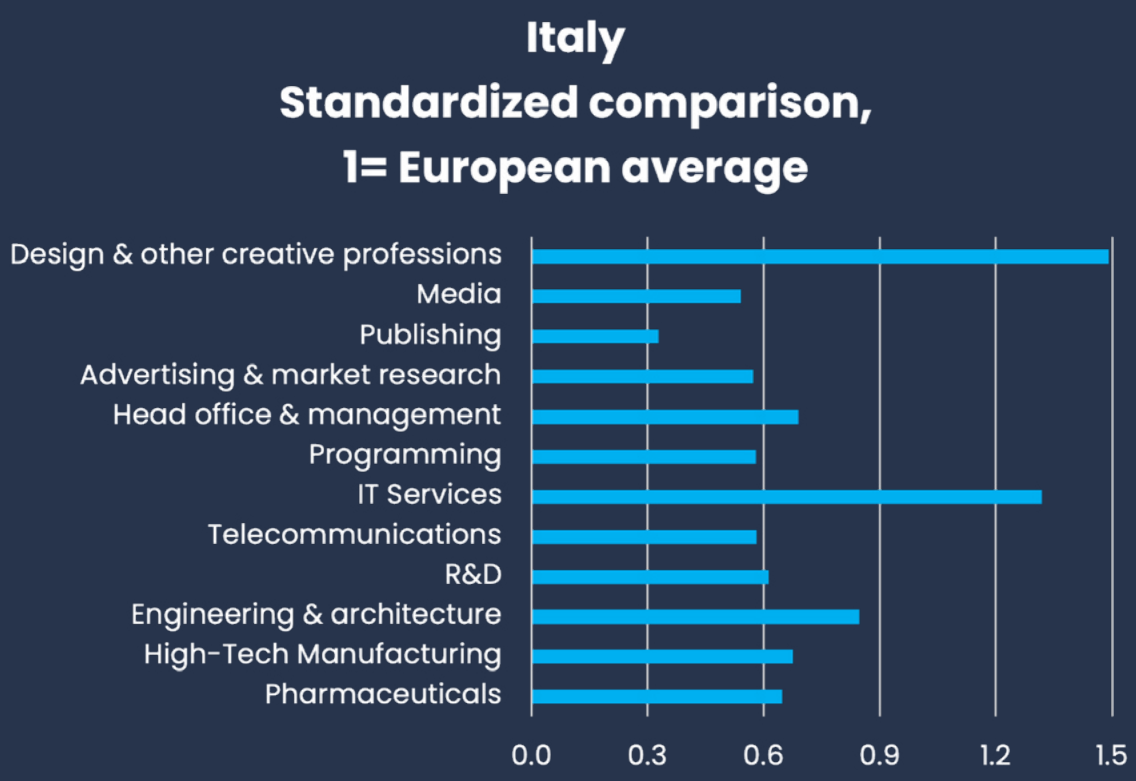
- In 2025, 5.5 percent of the working-age adults of Italy were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is an increase from 5.3 percent the year before. The level has risen from 3.8 percent in 2014.

- Amongst the total population of the Italy, 3.7 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Italy overperforms, having a 0.7 percentage points higher share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Lombardia region 9.5 percent of the adults are employed in brain business jobs, while the rate is 8.2 percent in the Rome capital region. Emilia-Romagna and Piemonte regions also have a high share of brain business jobs per adult, 6.1 and 5.9 percent, respectively.

- Italy has particular relative strengths in IT services, where 134 450 are employed. The country has also recently developed a relatively strong design & other creative works sector, with 267 150 employees.

	Brain business jobs per capita
Lombardia	9.5%
Rome	8.2%
Emilia-Romagna	6.1%
Piemonte	5.9%
Provincia Autonoma di Trento	5.9%
Veneto	5.5%
Toscana	5.5%
Provincia Autonoma di Bolzano/Bozen	5.4%
Marche	4.9%
Liguria	4.7%
Friuli-Venezia Giulia	4.6%
Valle d'Aosta/Vallée d'Aoste	4.4%
Umbria	4.2%
Abruzzo	4.0%
Molise	3.4%
Basilicata	3.2%
Campania	3.0%
Puglia	2.9%
Sardegna	2.9%
Sicilia	2.4%
Calabria	2.1%


Italy
Standardized comparison,
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Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
0.0
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1.5

Spain

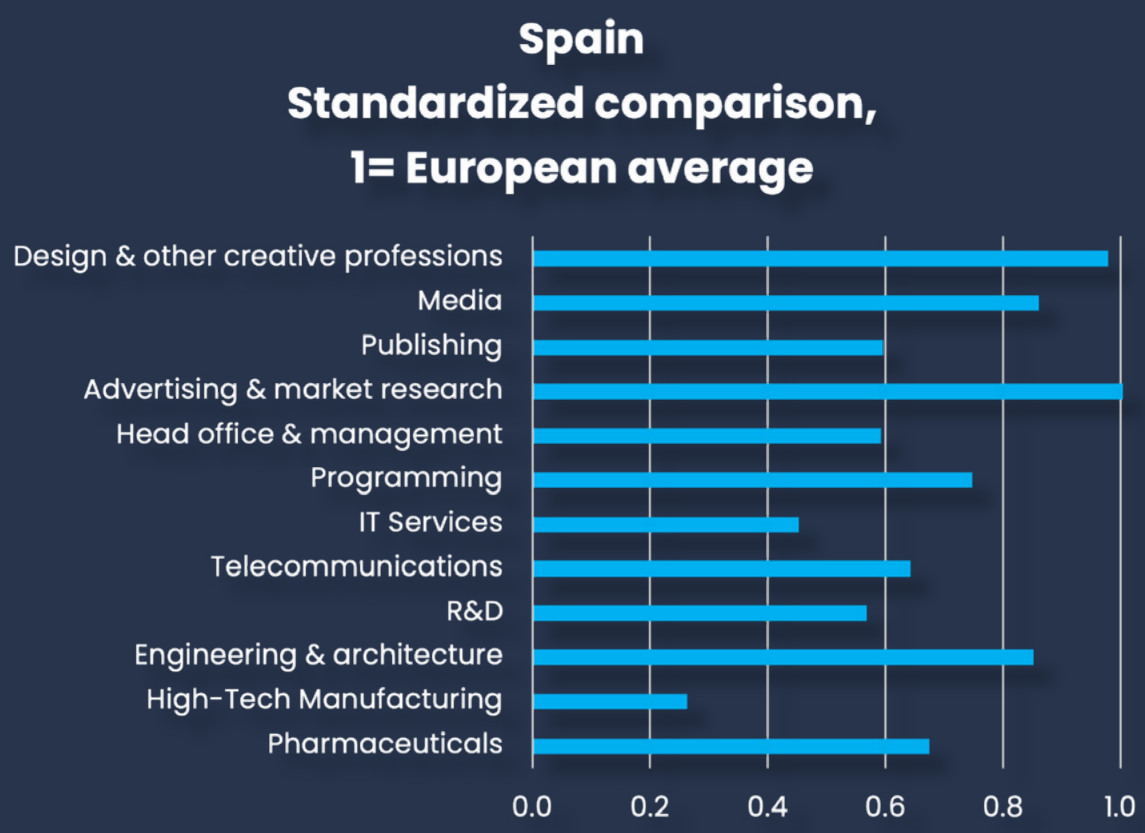
- In 2025, 5.4 percent of the working-age adults of Spain were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is an increase from 5.2 percent the year before. The level has risen from 3.6 percent in 2014.

- Amongst the total population of the Spain, 6.4 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Spain underperforms, having a 1.0 percentage points lower share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Madrid region fully 13.7 percent of the adults are employed in brain business jobs. Cataluña and País Vasco regions also have a high share of brain business jobs per adult, 7.5 and 5.2 percent respectively.

- Spain has particular relative strengths in design & other creative professions, where 152 050 are employed. The country has also recently developed a relatively strong engineering & architecture sector, with 326 450 employees.

	Brain business jobs per capita
Madrid	13.7%
Cataluña	7.5%
País Vasco	5.2%
Comunidad Foral de Navarra	4.3%
Aragón	3.8%
Galicia	3.7%
Principado de Asturias	3.7%
Comunitat Valenciana	3.5%
Illes Balears	3.2%
Andalucía	3.1%
La Rioja	2.9%
Región de Murcia	2.9%
Castilla y León	2.8%
Canarias	2.7%
Cantabria	2.7%
Castilla-La Mancha	1.9%
Extremadura	1.8%
Ciudad de Ceuta	1.1%
Ciudad de Melilla	0.9%


Spain
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
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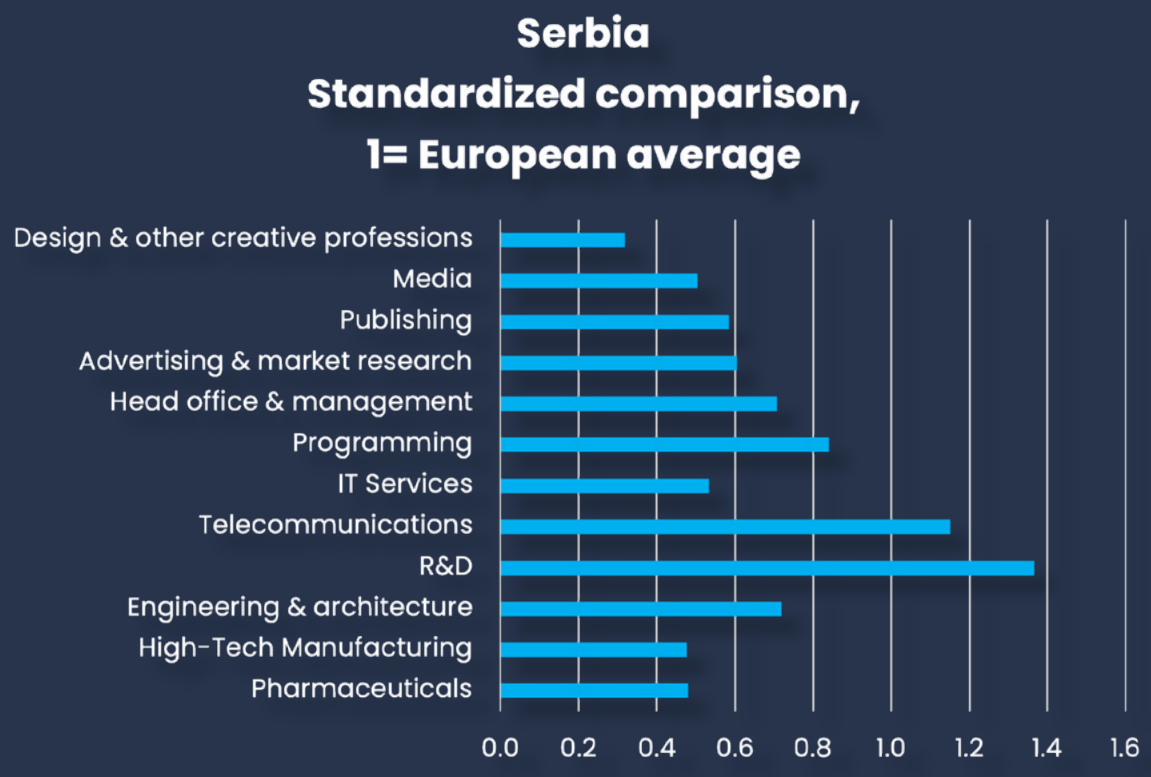
Serbia

- In 2025, 5.4 percent of the working-age adults of Serbia were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is an increase from 5.2 percent the year before.

- Amongst the total population of the Serbia, 5.6 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Serbia underperforms, having a 0.5 percentage points lower share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- Serbia has particular relative strengths in research & development, where 9 350 are employed. The country also has recently developed a relatively strong telecommunications sector, with 18 500 employees.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R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
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1.6

Romania

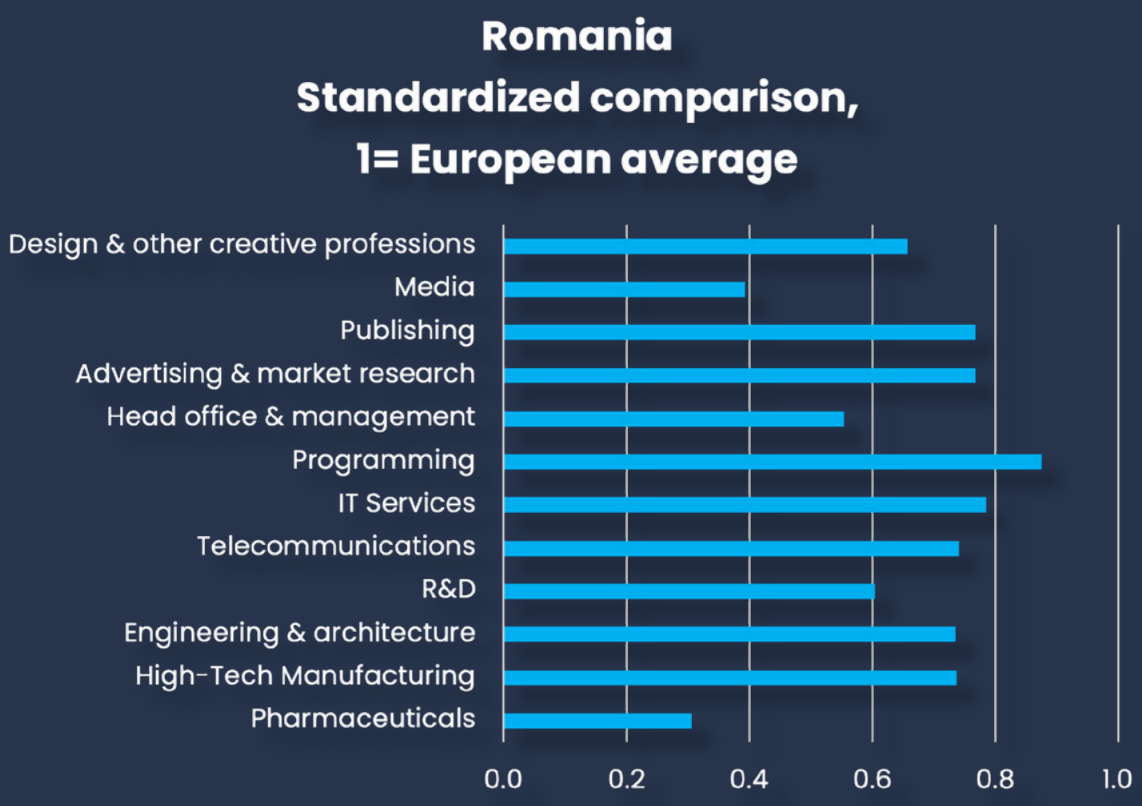
- In 2025, 5.4 percent of the working-age adults of Romania were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is an increase from 5.3 percent the year before. The level has risen from 3.0 percent in 2014, a significant growth.

- Amongst the total population of the Romania, 6.0 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Romania underperforms, having a 0.8 percentage points lower share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Bucharest region fully 21.5 percent of the adults are employed in brain business jobs, this is the 4th highest share in a regional comparison, with all European regions that data exists for. Bucharest has rapidly climbed to this impressive position. Nord-Vest and Vest regions also have a high share of brain business jobs per adult, 5.7 and 5.6 percent respectively.

- Romania has particular relative strengths in programming, where 191 000 are employed. The country has also recently developed a relatively strong high-tech manufacturing sector, with 34 750 employees.

	Brain business jobs per capita
Bucharest	21.5%
Nord-Vest	5.7%
Vest	5.6%
Centru	3.8%
Nord-Est	2.4%
Sud-Est	1.9%
Sud-Muntenia	1.9%
Sud-Vest Oltenia	1.7%


Romania
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
0.0
0.2
0.4
0.6
0.8
1.0

Greece

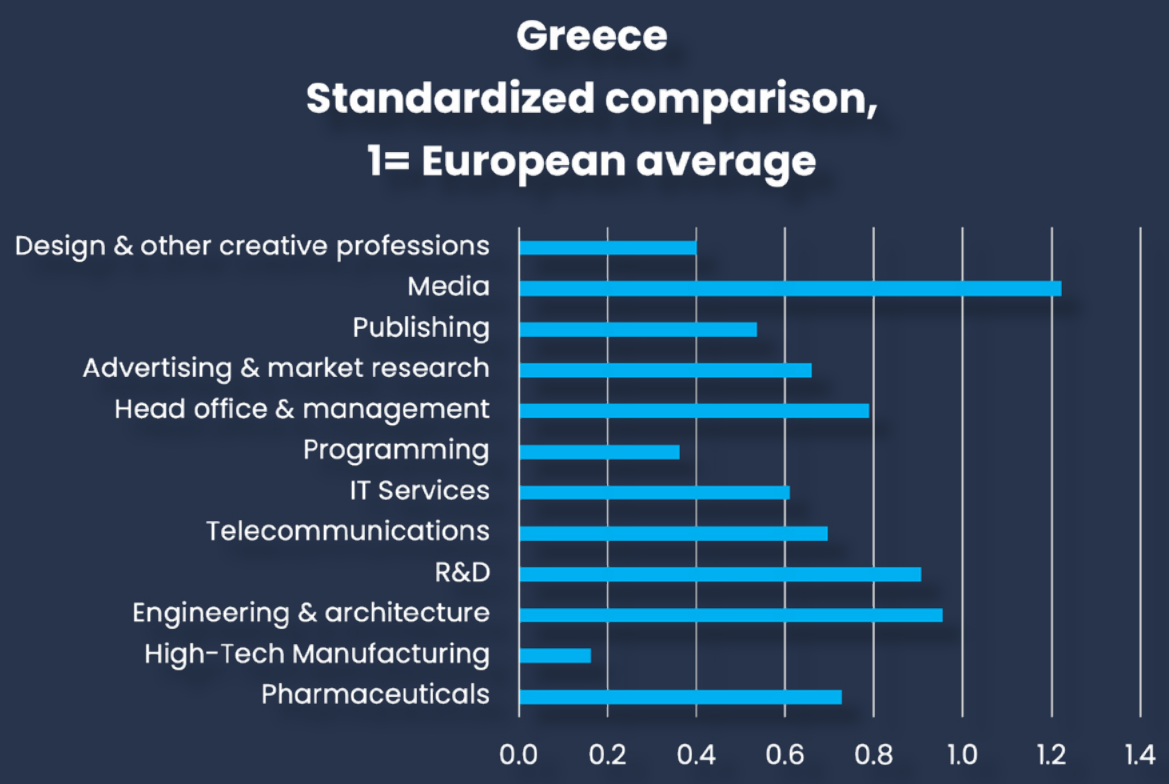
- In 2025, 4.7 percent of the working-age adults of Greece were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is the same as last year. The level has risen from 4.1 percent in 2014.

- Amongst the total population of the Greece, 6.5 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. Greece underperforms, having a 1.8 percentage points lower share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

- In the Athens region fully 8.5 percent of the adults are employed in brain business jobs. Kriti and Kentriki Makedonia regions have 3.3 percent of adults in brain business jobs, second only to the capital region.

- Greece has particular relative strengths in media, where 14 050 are employed. The country has also recently developed a relatively strong research & development sector, with 11 500 employees.

	Brain business jobs per capita
Athens	8.5%
Kriti	3.3%
Kentriki Makedonia	3.3%
Dytiki Elláda	2.4%
Ionia Nisia	2.4%
Ipeiros	2.4%
Notio Aigaio	2.4%
Thessalia	2.2%
Anatoliki Makedonia, Thraki	2.1%
Peloponnisos	2.0%
Dytiki Makedonia	2.0%
Voreio Aigaio	1.8%
Sterea Elláda	1.8%

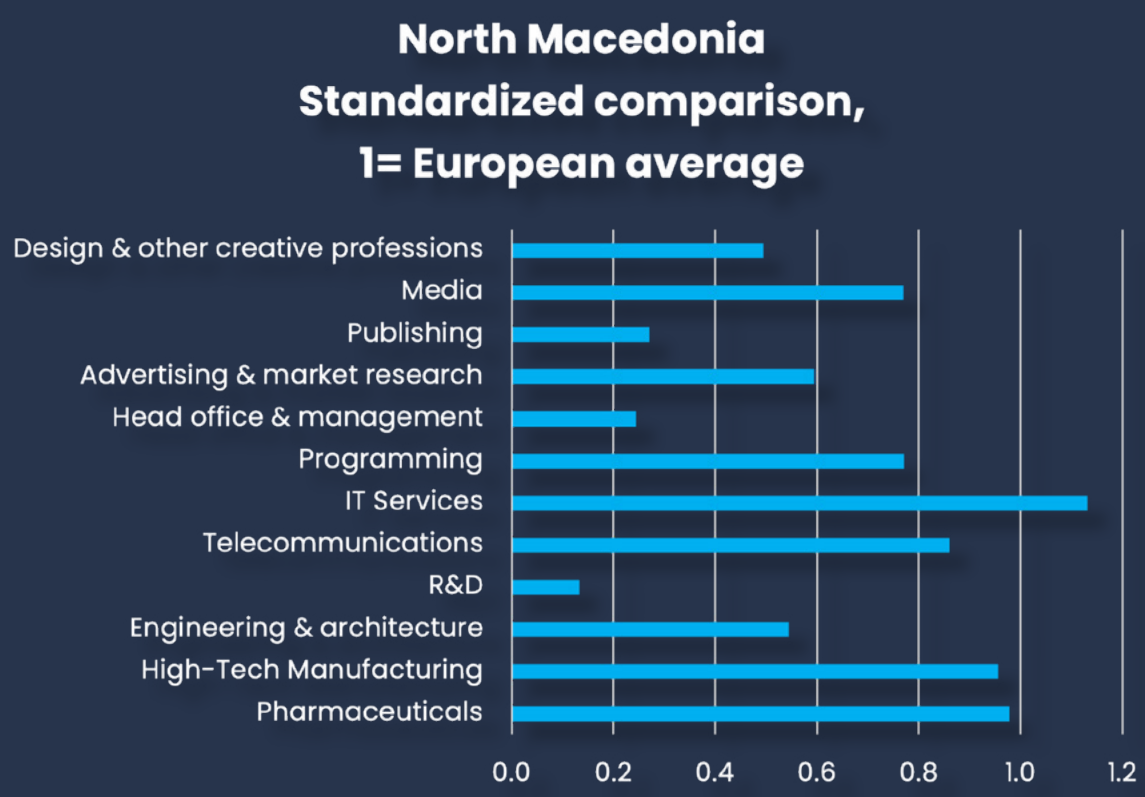

Greece
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
0.0
0.2
0.4
0.6
0.8
1.0
1.2
1.4

North Macedonia

- In 2025, 4.7 percent of the working-age adults of North Macedonia were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is a significant increase from 4.1 percent the year before.

- Amongst the total population of the North Macedonia, 4.9 percent are engineers and scientists. A comparison of European nations shows that a strong link exists between expert density and brain business jobs density. Some countries outperform in terms of brain business jobs, in relation to their expert density, while some overperform. North Macedonia underperforms, having a 0.8 percentage points lower share of adults in brain business jobs, in relation to how much would be predicted by the expert density of the nation.

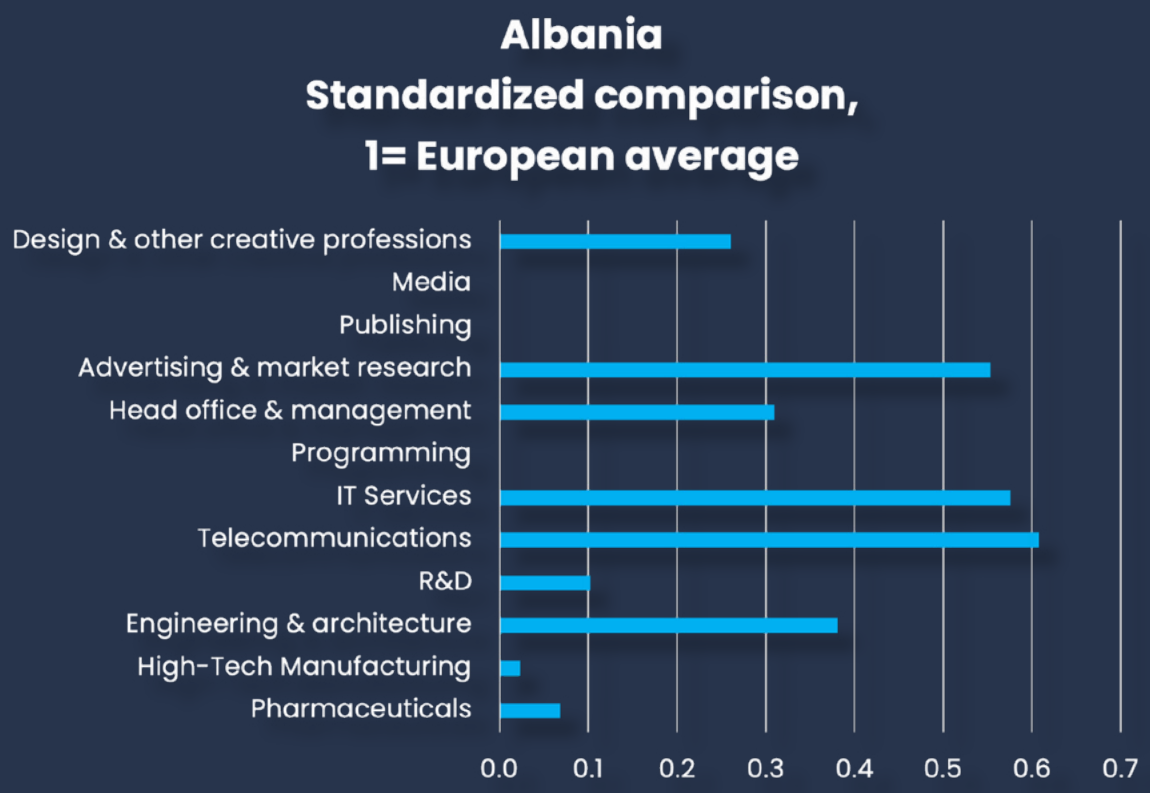
- North Macedonia has particular relative strengths in IT services, where 3 050 are employed. The country has also recently developed a relatively strong pharmaceutical sector, with 2 650 employees.


North Macedonia
Standardized comparison,
1= European average
Design & other creative professions
Media
Publishing
Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
0.0
0.2
0.4
0.6
0.8
1.0
1.2

Albania

- In 2025, 1.7 percent of the working-age adults of Albania were employed in brain business jobs, a term for employment in knowledge-intensive firms in tech, information and communications technology, advanced services, and creative professions. This is a significant increase from 1.4 percent the year before.

- Albania has particular relative strengths in telecommunications, where 4 300 are employed. The country has also recently developed a relatively strong IT services sector, with 2 900 employees.


Albania
Standardized comparison,
1= European average
Design & other creative professions
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Advertising & market research
Head office & management
Programming
IT Services
Telecommunications
R&D
Engineering & architecture
High-Tech Manufacturing
Pharmaceuticals
0.0
0.1
0.2
0.3
0.4
0.5
0.6
0.7

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