

THE LISTENING ROOM — SOCIAL INTELLIGENCE LAB

THE ROMANIAN BEHAVIOR INDEX

QUARTERLY

Q2 2026

·

PILLAR 01

—

ARTIFICIAL INTELLIGENCE

What Romanians say about AI — and what they actually do. The gap between the two is the story.

AGGREGATE -
ONLY
GDPR -
COMPLIANT BY
DESIGN
NO INDIVIDUAL
PROFILING

ABOUT THIS INDEX · HOW TO READ IT

How to read this index.

The Romanian Behavior Index tracks how the country thinks and acts across the pillars that move markets and policy. It is assembled from representative, citable sources — and it is honest about the difference between an opinion and an action.

The three layers

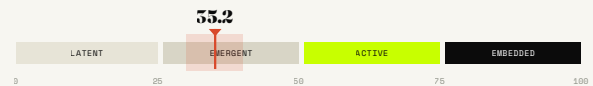
Attitude — what people *declare* in representative surveys (trust, optimism, concern). **Behaviour** — what people and institutions *do*, read from revealed statistics (adoption, usage). **Signal** — the quarter-to-quarter movement, drawn from high-frequency indicators and The Listening Room's aggregate discourse layer.

The signature metric: the gap

Each pillar score is built from the strongest available indicators for that construct — attitude, behaviour or delivery. The gap analysis then reads the distance between declared belief and revealed capacity: a wide gap marks latent demand, institutional friction, or a belief not yet acted on.

The index scale

Each pillar resolves to a 0–100 score read against four bands. The score is a transparent weighted mean of named, dated indicators — never a black box, never min-max inflation.



Bands: 0–25 Latent · 26–50 Emergent · 51–75 Active · 76–100 Embedded. Marker shows this issue's AI score with its plausible range.

THE HONESTY RULES

Every figure carries a source reference, a date where applicable, and a confidence tier (●●● representative · ●●○ indicative · ●○○ directional). Where the representative backbone hasn't refreshed, we carry its value forward with its date visible rather than imply a change that wasn't measured. Audiences are read only in aggregate; no claim is ever linked to an identifiable person.

PILLAR 01 / 04 · Q2 2026

Artificial Intelligence

Romania holds the lowest enterprise-AI adoption in the European Union — yet its citizens are among the most optimistic. In Romania, AI has arrived as a personal habit long before it became an institutional capability.

RBI-AI · 35.2/100 · EMERGENT

NATIONAL SNAPSHOT · ARTIFICIAL INTELLIGENCE · Q2 2026

35.2

OUT OF 100

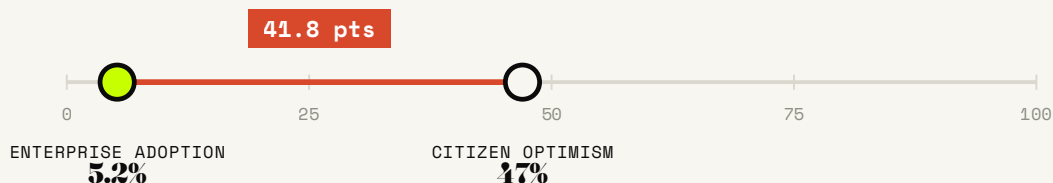
EMERGENT · RANGE 30-40

Openness is running ahead of capability.

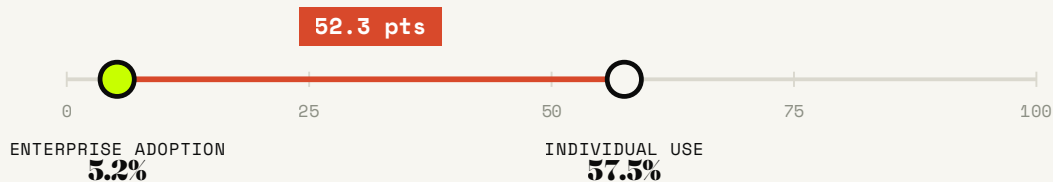
Attitude scores 36.9; behaviour scores 33.7. But the aggregate hides the real finding. Romanians are curious and individually active with AI, while the organisations that employ them remain the most AI-absent in the EU. Three gaps carry the story.

THREE GAPS – PUBLIC OPENNESS, INDIVIDUAL USE, AND ORGANISATIONAL CAPABILITY

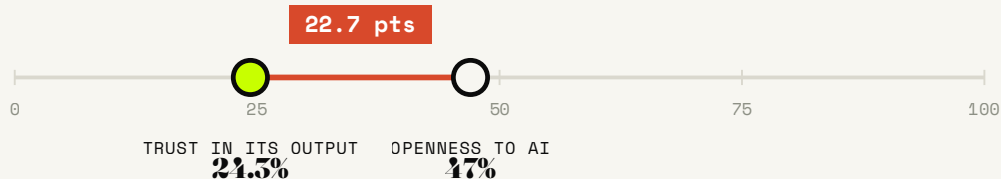
GAP 01



GAP 02



GAP 03



Read: the widest gap isn't between optimism and reluctance — it's between individuals and their organisations. 52.3 points separate the Romanians already using AI from the firms that have embedded it.

Markers: hollow = the leading pole · lime = the lagging pole.

Sources S1, S2, S5 – see appendix.

ATTITUDE · WHAT ROMANIANS DECLARE · ●●● / ●●○

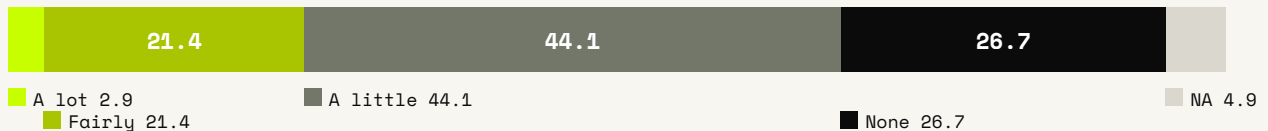
Open in principle, sceptical of the output.

Romanians read as more informed and more open to AI's benefits than the international average, and less anxious about it. The optimism is real — but it stops at the result the machine hands back.

Trust in what AI produces

TRUST IN AI OUTPUTS – NATIONAL

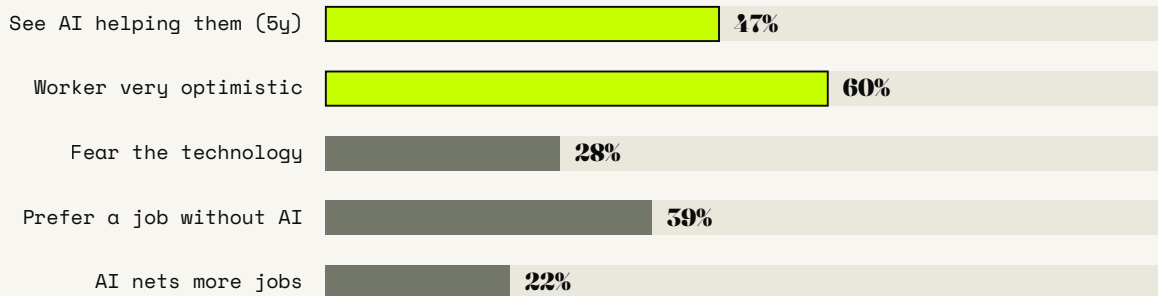
INSCOP · MAR 2026



Just **24.3%** place a lot or fair trust in AI outputs, against **70.8%** who trust them little or not at all. Openness to the idea has not translated into confidence in the answer.

S2 · INSCOP Barometrul Informat.ro ed. VIII, national representative, 2–6 Mar 2026. ●●●

Optimism, and its limits



Nearly half expect AI to help them learn or redefine their work, and Romanian workers report among the highest optimism about their own role of 48 countries. Yet a hard core remains wary: 39% would rather work without it, and only 22% believe AI will create more jobs than it removes.

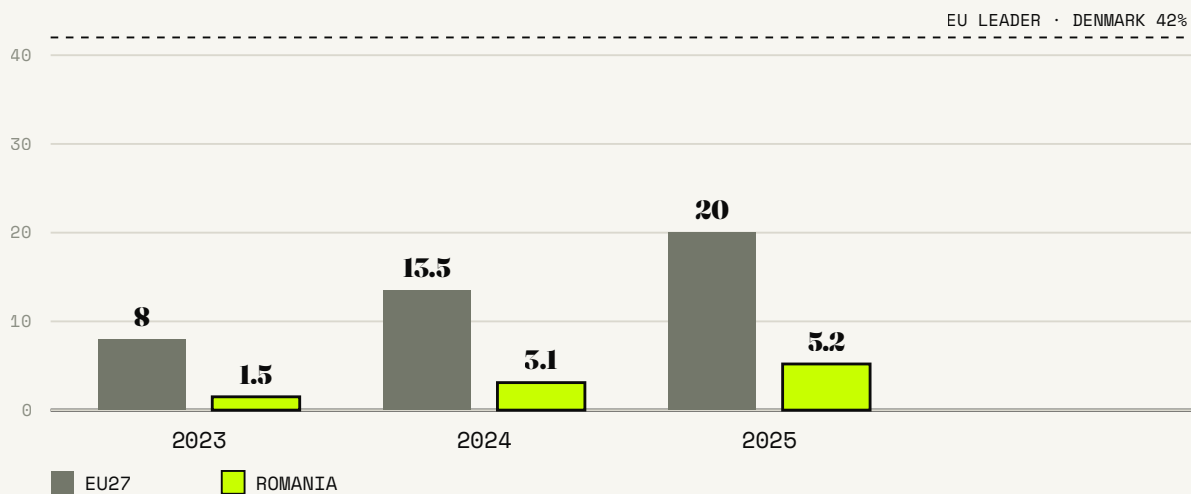
S3 PwC Workforce Hopes & Fears 2025 (R0, n=500) ●●○ · S5
Exact Consumer Trust Barometer 2025 (urban, n=500) ●●○ · S4
Ipsos AI Monitor 2025 ●●○.

BEHAVIOUR · WHAT ROMANIANS AND THEIR FIRMS DO · ●●●

A nation of individual users, inside AI-absent firms.

The behavioural record splits cleanly in two. Individuals have moved; organisations have not. Romania closes 2025 with the lowest enterprise-AI adoption of any EU member state.

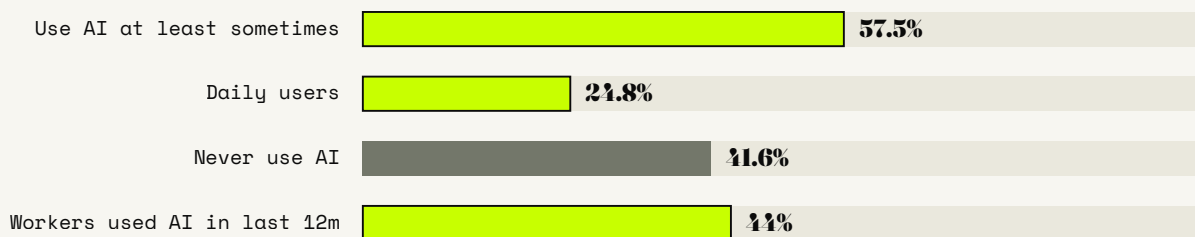
Enterprise adoption — Romania vs. the EU



At **5.2%**, Romanian enterprise adoption is roughly a quarter of the EU average (20%) and an eighth of the leader. It is rising — from 1.5% in 2023 — but the EU is pulling away faster than Romania is catching up. Romania ranks **last of 27**.

S1 · Eurostat isoc_eb_ai, enterprises 10+ employees, 2025
reference year. ●●●

Individual use tells the opposite story



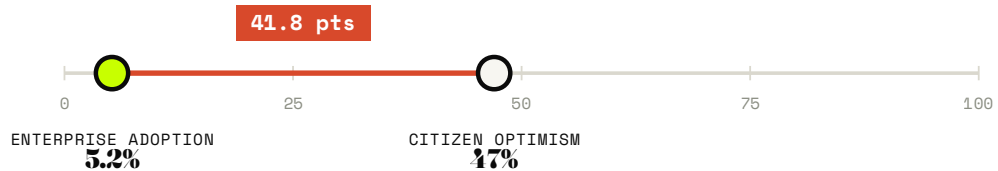
Most Romanians now touch AI at least occasionally and a quarter use it daily, while 41.6% still never do. The behaviour exists; it simply lives on personal devices, not in company workflows.

S2 INSCOP, Mar 2026 ●●● · S3 PwC 2025 ●●○ · S6 eJobs
employer survey, Mar 2026 (n=196): 5.2% embedded across most
departments, 47.4% sporadic. ●●○

THE GAPS · WHERE STRATEGY LIVES

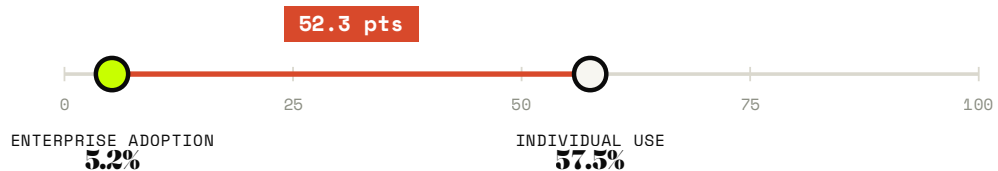
Three distances that define the Romanian AI market.

GAP 01 · 41.8 POINTS



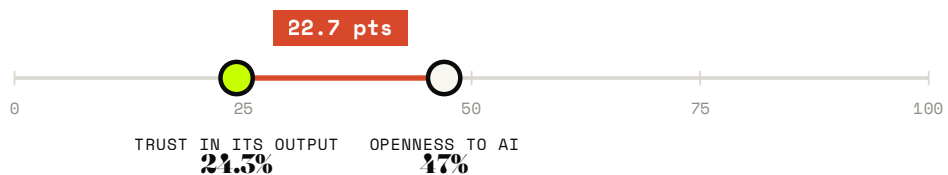
Citizens are optimistic; institutions are absent.

GAP 02 · 52.3 POINTS



AI is a personal habit, not an organisational capability.

GAP 03 · 22.7 POINTS



Curious about the tool, sceptical of the result.

SO WHAT — FOR THE PEOPLE WHO BUY THIS

Brands & agencies: the audience is ready in attitude but under-served in workflow. AI-enabled products meet optimism, but messaging must answer the trust gap, not assume it away. **Public affairs & institutions:** the constraint is not citizen resistance; it is organisational capability. The lever is enterprise enablement, not public persuasion.

SIGNAL · WHO MOVES, WHO STALLS · THE QUARTERLY LAYER

The divide is generational, urban, and educational.

Beneath the national averages sits a sharp split. Daily AI use concentrates among the under-45s, the university-educated, private-sector employees, and Bucharest and large cities. Non-use concentrates among over-60s, primary education, and rural Romania.

LEADING EDGE — HIGHER USE & TRUST	LAGGING EDGE — NON-USE
18–44; tertiary education	60+; primary education
Bucharest & large urban	Rural
Private-sector employees	Public-sector & non-employed

S2 · INSCOP crosstabs, Mar 2026. Reported in aggregate segments only. ●●●

Anxiety is contained but present: **19.1%** are very worried about losing their job to AI — concentrated, like non-use, at the lagging edge. The fear tracks exclusion, not exposure.

WHAT MOVES NEXT QUARTER

This issue sets the baseline from representative sources. The Q3 delta will be driven by the high-frequency layer — fresh INSCOP/Eurostat releases as they land, plus The Listening Room's aggregate discourse signal on AI salience and objection patterns. The backbone moves when the surveys move; the signal moves every quarter. No quarter-over-quarter change is asserted without a dated source behind it.

METHODOLOGY · INDEX CONSTRUCTION FOR THE AI PILLAR

How the 35.2 was built.

The AI sub-index is a weighted mean of four representative indicators, each already expressed as a 0–100 share. Weights are fixed in advance and disclosed. No normalisation step is applied that could inflate values toward the extremes; the score moves only when its inputs move.

COMPONENT	SIDE	VALUE	WEIGHT	CONTRIBUTION	SRC	CONF
Openness / optimism	Attitude	47	0.25	11.75	S5	●●○
Trust in AI outputs	Attitude	24.3	0.20	4.86	S2	●●●
Individual adoption	Behaviour	57.5	0.30	17.25	S2	●●●
Enterprise adoption	Behaviour	5.2	0.25	1.30	S1	●●●
RBI-AI				35.2	range	30–40

The plausible range reflects mixed source confidence (one urban-only and two indicative inputs alongside two representative ones). The range expresses uncertainty from mixed source confidence, not a statistical confidence interval; it is reported as a band, not a false-precision point.

Limitations

Openness (S5) is urban-only and slightly overstates the national figure. Employer signals (S6) are self-selected and directional. Enterprise adoption (S1) covers firms of 10+ employees, so the smallest businesses are out of frame. These are flagged, not hidden.

Ethics & compliance

All inputs are published aggregate statistics or licensed survey results. The Listening Room's discourse layer is GDPR-compliant and aggregate-only: composite, synthesised signal never linked to identifiable individuals. This boundary is enforced in the methodology, not bolted on.

SOURCES & PROVENANCE

Every number, traced.

REF	SOURCE	CONF
S1	Eurostat — Use of AI in enterprises dataset isoc_eb_ai, 2025 reference year (released Dec 2025). Enterprises with 10+ employees.	●●●
S2	INSCOP Research — Barometrul Informat.ro, ed. VIII National representative sample, fieldwork 2-6 March 2026.	●●●
S3	PwC — Workforce Hopes & Fears Survey 2025 Romania subset (500 employees, all counties); 48 countries, ~50,000 respondents.	●●○
S4	Ipsos — AI Monitor 2025 Online survey across 31 countries; Romania directional read.	●●○
S5	Exact Business Solutions — Consumer Trust Barometer 2025 Online, quarterly, 500 adults — urban population only (not nationally representative).	●●○
S6	eJobs — Employer AI survey March 2026, 196 companies across 19 sectors. Self-selected; directional.	●●○

●●● representative / official · ●●○ indicative · ●○○ directional. Confidence reflects sampling and representativeness, not the credibility of the publisher.

The Romanian Behavior Index is a product of The Listening Room — social intelligence lab. Methodology grounded in established academic frameworks (Ajzen, Theory of Planned Behaviour; Plutchik; Schwartz). Aggregate-only · GDPR-compliant by design · no individual profiling.

THE LISTENING ROOM

The gap is the story.

Next in this issue — Pillar 02 Trust · Pillar 03 Economy ·
Pillar 04 Work.

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