THE LISTENING ROOM — SOCIAL INTELLIGENCE LAB

# THE ROMANIAN BEHAVIOR INDEX

QUARTERLY Q2 2026 · THE FULL EDITION

Four pillars — Artificial Intelligence, Trust, Economy, Work. One country, read through the distance between what it says and what it does.

AGGREGATE-ONLY
GDPR-COMPLIANT BY DESIGN
NO INDIVIDUAL PROFILING

**THE INDEX** · HOW TO READ IT

# How to read this index.

The Romanian Behavior Index reads the country across the pillars that move markets and policy. It is assembled from representative, citable sources, and it keeps a strict line between an opinion and an action.

## Three layers

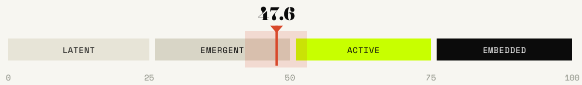
**Attitude** is what people declare in representative surveys. **Behaviour** is what people and institutions actually do, read from revealed statistics. **Signal** is the quarter-to-quarter movement, drawn from high-frequency indicators and The Listening Room's aggregate discourse layer — a GDPR-compliant measure of public salience and objection patterns across public media and forums. This edition sets the survey-based baseline; the discourse layer's full specification follows in a methodology appendix.

## The signature metric: the gap

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

## The scale

Each pillar resolves to a 0–100 score across four bands. Every score is a disclosed weighted mean of named, dated indicators. Rates that are not population shares (inflation, GDP, headcounts) are reported directly rather than forced into the score.




Bands: 0–25 Latent · 26–50 Emergent · 51–75 Active · 76–100 Embedded. Marker shows this edition's overall reading. Ranges express uncertainty from mixed source confidence, not statistical confidence intervals.

THE HONESTY RULES

Every figure carries a source reference, a date where applicable, and a confidence tier (●●● representative · ●●○ indicative · ●○○ directional). Where the representative backbone has not refreshed, its value is carried forward with its date visible. Audiences are read only in aggregate; no claim is ever linked to an identifiable person.

Q2 2026 · THE AGGREGATE

# Belief runs outward. Delivery runs behind.

One pattern crosses all four pillars. Romanians place trust and hope outward and upward: in the European Union, in the institutions that stand outside politics, in AI as a personal tool, in their own optimism. The national, institutional and structural layer underneath does not keep pace. Enterprise AI adoption is the lowest in the Union; trust in Parliament has fallen to the low teens; the consumption model has stalled; labour participation is among the EU's lowest while the country, one of the Union's largest labour exporters, imports the workers it will not activate at home. In every pillar, what is declared runs ahead of what is delivered. That distance is the edition's single finding.

**THE FOUR PILLARS** · Q2 2026

# 47.6

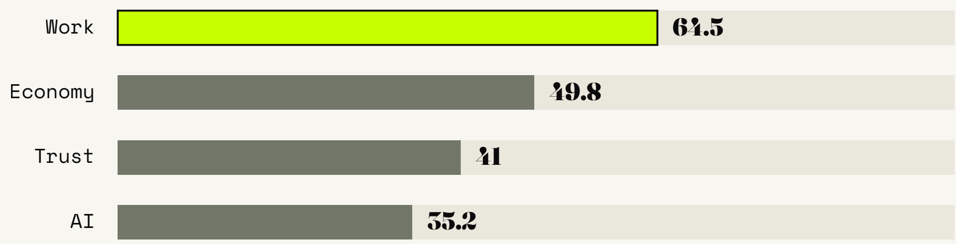
OUT OF 100

EMERGENT · RANGE 42–53

## An Emergent country, unevenly.

The overall reading is the unweighted mean of the four pillars. It is an orientation, not a verdict: the pillars measure different constructs, so the spread between them carries as much meaning as the midpoint. Work scores highest and is the most misleading in isolation; AI scores lowest and is the fastest-moving.

PILLAR SCORES ON THE 0–100 SCALE




AI 35.2 · Trust 41.0 · Economy 49.8 · Work 64.5. Each score is built and sourced in its chapter. Overall = simple mean = 47.6.

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

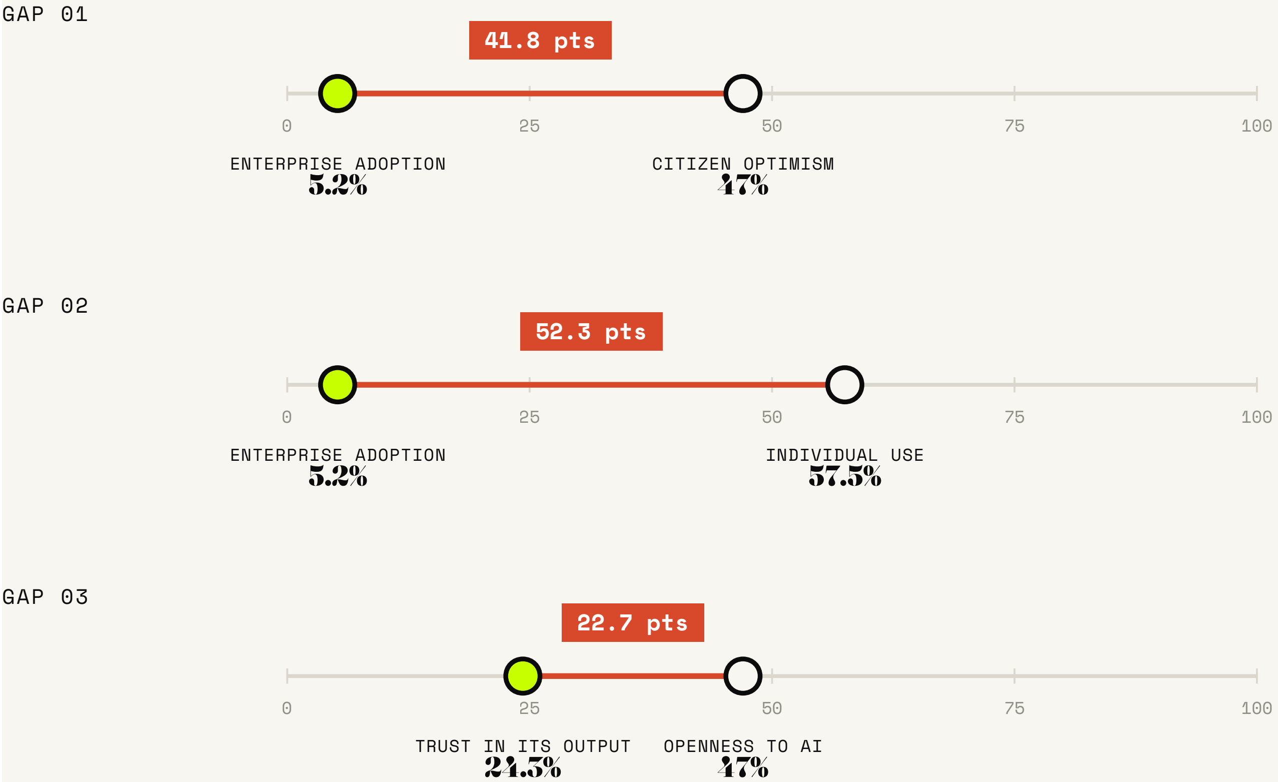
OUT OF 100

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




**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.

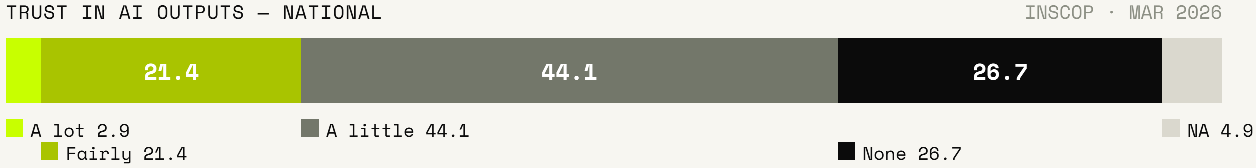
Markers: hollow = the leading pole · lime = the lagging pole.
Sources S1, S2, S5 — see appendix.

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.

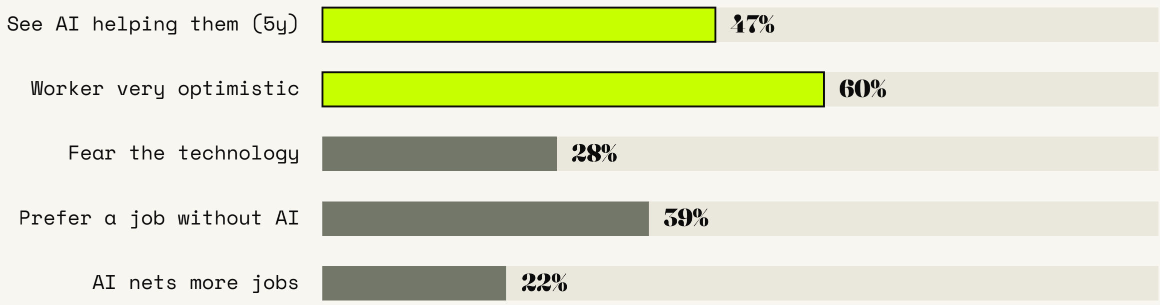
## Trust in what AI produces




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.

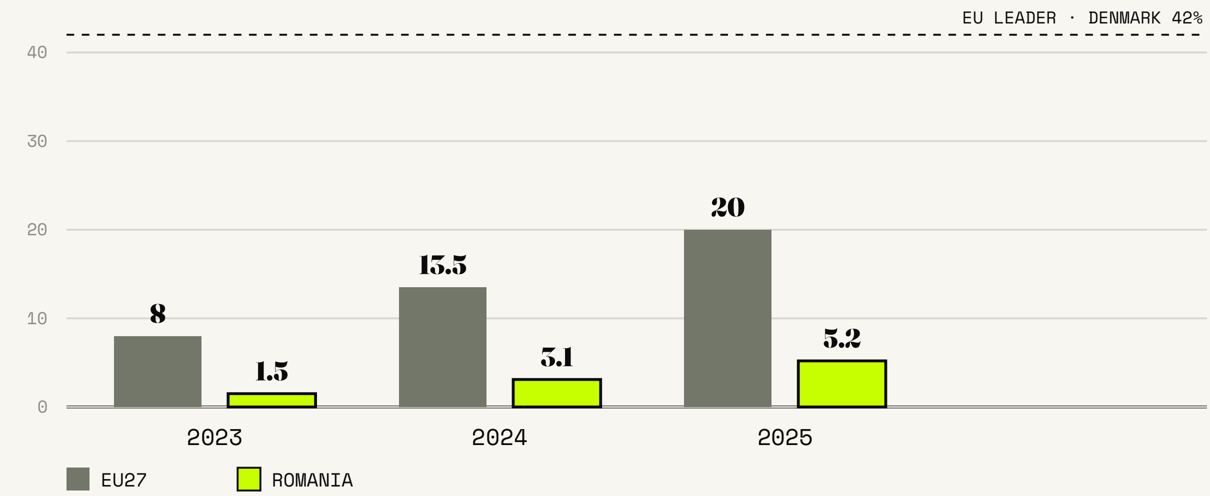
S3 PwC Workforce Hopes & Fears 2025 (RO, n=500) ●●○ · S5 Exact Consumer Trust Barometer 2025 (urban, n=500) ●●○ · S4 Ipsos AI Monitor 2025 ●●○.

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.

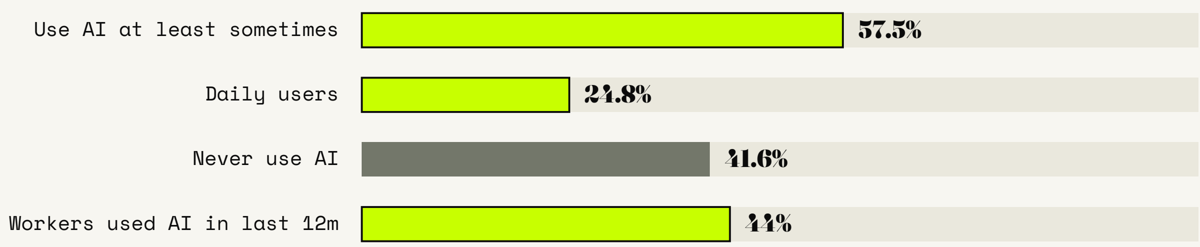
## Enterprise adoption — Romania vs. the EU




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



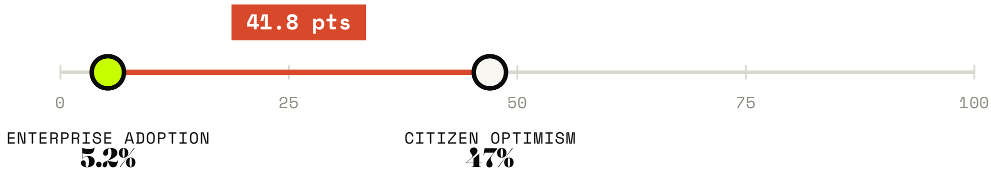

Most Romanians now touch AI at least occasionally and a quarter use it daily, while 41.6% still never do. The behaviour exists; it simply lives on personal devices, not in company workflows.

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

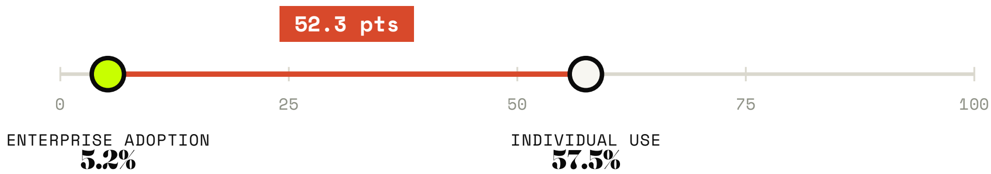
# Three distances that define the Romanian AI market.

GAP 01 · 41.8 POINTS



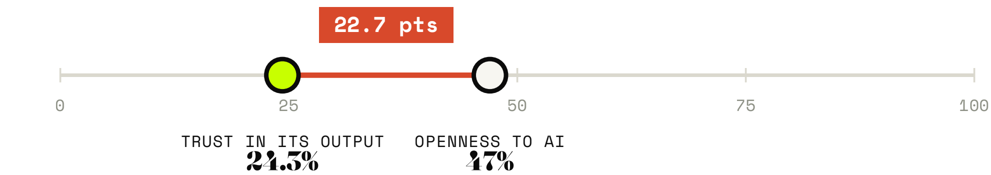

**Citizens are optimistic; institutions are absent.**

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**<br>dataset isoc_eb_ai, 2025 reference year (released Dec 2025). Enterprises with 10+ employees. | ●●● |
| S2 | **INSCOP Research — Barometrul Informat.ro, ed. VIII**<br>National representative sample, fieldwork 2–6 March 2026. | ●●● |
| S3 | **PwC — Workforce Hopes & Fears Survey 2025**<br>Romania subset (500 employees, all counties); 48 countries, ~50,000 respondents. | ●●○ |
| S4 | **Ipsos — AI Monitor 2025**<br>Online survey across 31 countries; Romania directional read. | ●●○ |
| S5 | **Exact Business Solutions — Consumer Trust Barometer 2025**<br>Online, quarterly, 500 adults — urban population only (not nationally representative). | ●●○ |
| S6 | **eJobs — Employer AI survey**<br>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.

PILLAR 02 / 04 · Q2 2026

# Trust

Confidence concentrates in the institutions that stand outside politics — the Church, the Army, the EU — and collapses in the ones that govern. Romania is strongly pro-European in sentiment, while the state absorbs the European money it believes in at a fraction of what was allocated.

RBI-TRUST · 41/100 · EMERGENT

**NATIONAL SNAPSHOT** · TRUST · Q2 2026

# 41

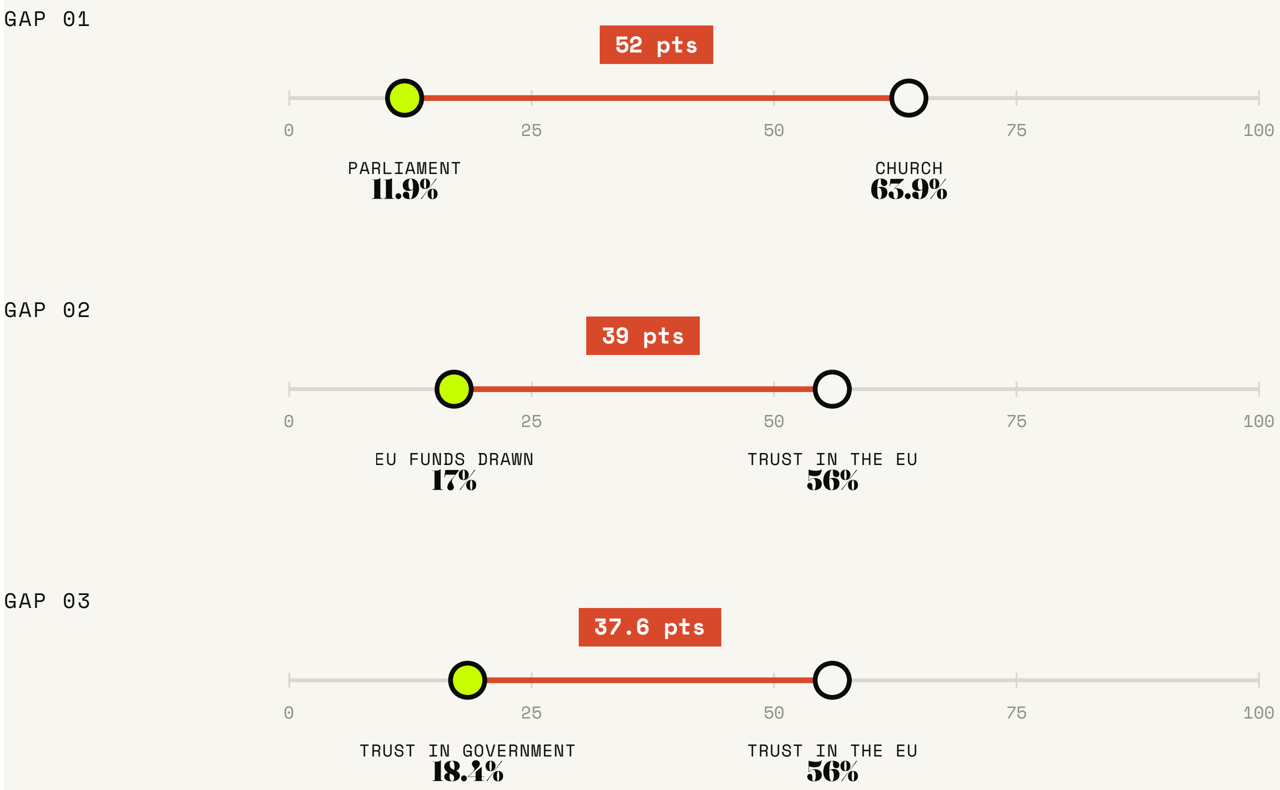
OUT OF 100

EMERGENT · RANGE 36–46

# Romanians trust the institutions that don't govern them.

The composite reads 41, but the average conceals the finding: trust is bimodal. The Church, Army and EU command majority confidence; Parliament and Government sit near collapse. And delivery, the state's capacity to act on the European trust it enjoys, sits at just 17.

THE THREE GAPS — HIGH TRUST VS. THE DEFICIT BENEATH IT




**Read:** the widest distance, 52 points, runs inside one population, between the Church and the Parliament. Romanians have not stopped trusting; they have redirected trust away from everything that governs them.

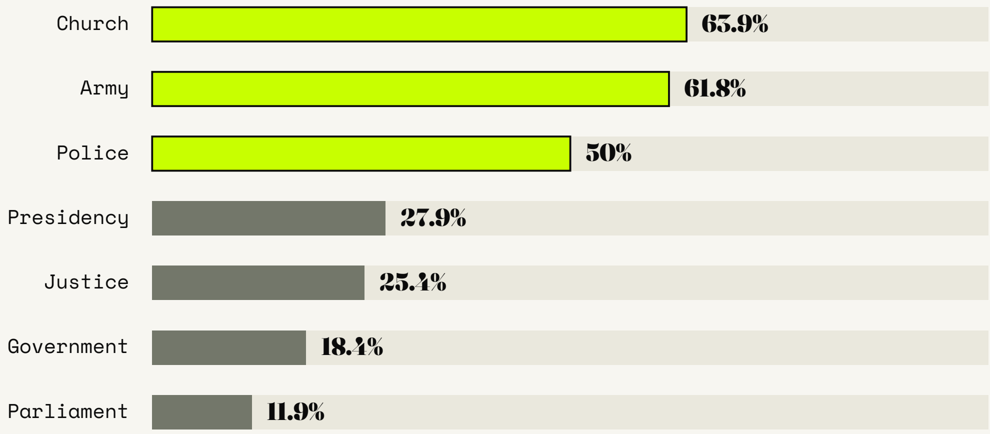
Lime marks the lower pole — the trust deficit or the delivery shortfall. Sources T1, T2, T3.

**ATTITUDE** · WHAT ROMANIANS DECLARE · ●●●

# Two countries of trust, in one population.

Confidence splits along a single fault line: institutions perceived as non-political hold majority trust, while every institution that wields power has lost it. The ranking is not close — it is a cliff.

## Trust in institutions — January 2026




Lime = non-political institutions · graphite = governing institutions. T1 · INSCOP ed. VII, national representative, 12–15 Jan 2026. ●●●

The Church (63.9%) and Army (61.8%) anchor the top; Parliament (11.9%) and Government (18.4%) the bottom, both still falling. Around 70% say the country is heading the wrong way. INSCOP reads this as chronic distrust in representative institutions — the kind that hollows out the centre and feeds anti-system politics.

## The exception: Europe and the alliance


Against the domestic collapse, external anchors hold. Romania trusts the EU more than the EU average (56% vs 52%), and remains among the most pro-European and pro-NATO populations in the Union. Trust has not vanished — it has migrated outward and upward.

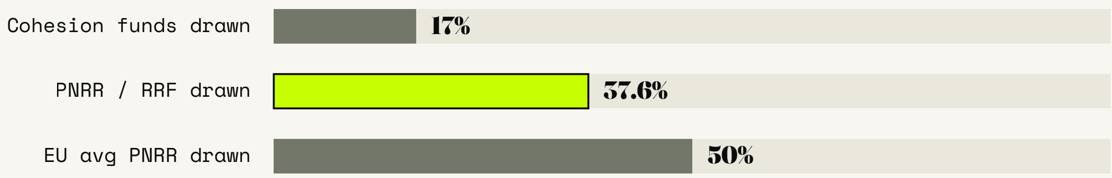
T2 Eurobarometer EB103, Spring 2025 ●●● · T4 INSCOP Dec 2024 (oppose EU exit, NATO) ●●○.

**BEHAVIOUR** · WHAT THE STATE DELIVERS ·

# Faith in Europe, delivered at 17 percent.

Sentiment is one thing; capacity is another. The behavioural counterpart to Romania's pro-European feeling is whether the state can actually turn allocated European money into projects on the ground. Here the record is thin.

### EU funds drawn down vs. allocation




Of the 2021–2027 cohesion envelope, about **17%** had been drawn by mid-2025; excluding advances, the Fiscal Council put real absorption near **2%** at the end of 2024. The PNRR stands at **37.6%** against an EU average closer to 50%, with roughly **€6.3bn** of projects at risk of being lost to the August 2026 deadline.

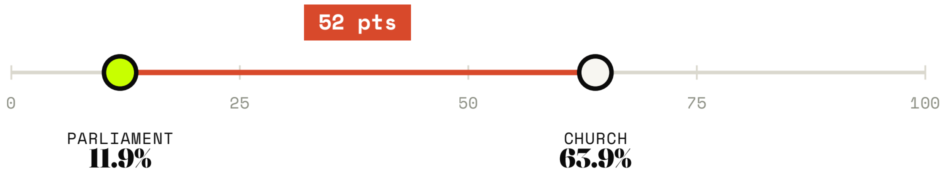
T3 · European Commission / Romanian Fiscal Council, drawdown to 2025. Cohesion absorption sits near a low EU average; the gap that matters is belief vs. delivery, not Romania vs. peers.

**Why this is the behaviour, not the attitude:** trust in the EU is something Romanians declare; absorption is something the Romanian state does — or fails to do. The distance between the two is the pillar's signature.

**THE GAPS** · WHERE STRATEGY LIVES

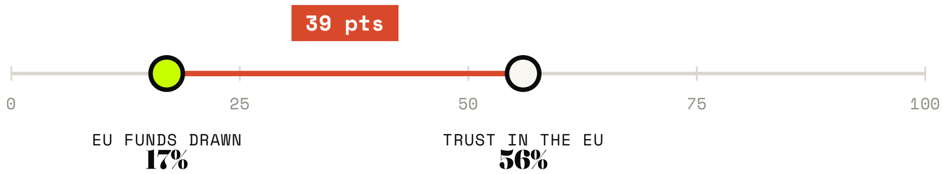
# Three distances that define Romanian trust.

GAP 01 · 52 POINTS · T1



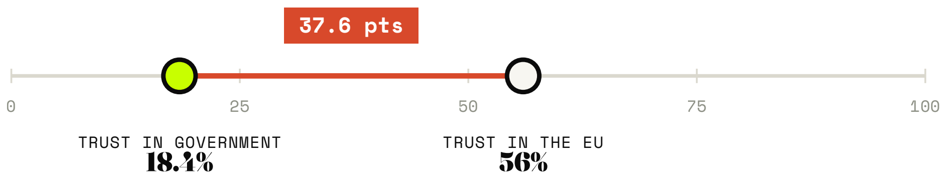

**Trust flows to whoever doesn't govern.**

GAP 02 · 39 POINTS · T2,T3




**Belief in Europe outruns the state's ability to absorb it.**

GAP 03 · 37.6 POINTS · T2,T1




**Romanians trust Brussels more than Bucharest.**

SO WHAT — FOR THE PEOPLE WHO BUY THIS

**Brands & agencies:** the trust premium in Romania attaches to the non-political and the European, the symbols of stability and continuity, not to authority or officialdom. Borrow credibility from the former, never assume it from the latter. **Public affairs & institutions:** the deficit is legitimacy of governance, not citizen goodwill toward Europe. For EU-funded programmes the binding constraint is delivery capacity, which the public already supports; the work is execution, not persuasion.

**SIGNAL** · WHO TRUSTS WHAT · THE QUARTERLY LAYER

# Distrust is patterned, not random.

Beneath the averages, trust sorts by political camp, age and place. Confidence in the Presidency and Government concentrates among USR and PNL voters, the young, the university-educated and Bucharest; the Church and Justice draw more from PSD and AUR voters, older and rural Romanians.

| HIGHER TRUST IN GOVERNING INSTITUTIONS | HIGHER TRUST IN SYMBOLIC INSTITUTIONS |
|---|---|
| USR & PNL voters | PSD & AUR voters |
| Under-30s; tertiary education | 60+; primary education |
| Bucharest & large urban | Rural Romania |

T1 · INSCOP crosstabs, Jan 2026. Aggregate segments only.
●●●

The deficit runs deeper than institutions. Romania also sits low on interpersonal trust in European comparison — fewer people agree that most others can be trusted. Institutional and social distrust compound: a society that trusts neither its rulers nor its neighbours leans on church, army and the idea of Europe instead.

T5 · World/European Values Survey, comparative. Directional.
●●○

WHAT MOVES NEXT QUARTER

The institutional ranking refreshes with each INSCOP wave; EU-funds drawdown updates as the Commission reports. Between releases, the quarterly delta comes from The Listening Room's aggregate discourse layer — trust-relevant salience and objection patterns around governing institutions and EU delivery. No movement is asserted without a dated source behind it.

**METHODOLOGY** · INDEX CONSTRUCTION FOR THE TRUST PILLAR

# How the 41 was built.

The Trust sub-index is a weighted mean of three representative trust measures, each a 0–100 share. Governing institutions carry the heaviest weight, because trust in the bodies that actually exercise power is what makes a state governable. Weights are fixed in advance and disclosed.

| COMPONENT | SIDE | VALUE | WEIGHT | CONTRIBUTION | SRC | CONF |
|---|---|---|---|---|---|---|
| Trust in governing institutions | Attitude | 20.9 | 0.45 | 9.40 | T1 | ●●● |
| Trust in non-political institutions | Attitude | 58.6 | 0.30 | 17.58 | T1 | ●●● |
| Trust in the EU | Attitude | 56 | 0.25 | 14.00 | T2 | ●●● |
| | | | **RBI-TRUST** | **41** | range | 36–46 |

Ranges express uncertainty from mixed source confidence, not statistical confidence intervals.

## Limitations

The composite mean hides a bimodal distribution — its single most important feature, foregrounded in the snapshot rather than buried in the number. EU-funds absorption is a delivery proxy, used in the gap analysis, not as an index input. Interpersonal trust enters as directional context only.

## Ethics & compliance

All inputs are published representative surveys or official EU fiscal data. The Listening Room's discourse layer is GDPR-compliant and aggregate-only: synthesised signal, never linked to an identifiable person. The boundary is built into the method.

SOURCES & PROVENANCE

# Every number, traced.

| REF | SOURCE | CONF |
|---|---|---|
| T1 | **INSCOP Research — Barometrul Informat.ro, ed. VII**<br>National representative, CATI, n=1,100, ±3%, fieldwork 12-15 January 2026. | ●●● |
| T2 | **Eurobarometer — Standard EB103, Spring 2025**<br>EU-wide official survey; Romania trust in EU and membership benefit. | ●●● |
| T3 | **European Commission / Romanian Fiscal Council**<br>EU funds absorption from the European Commission Cohesion Open Data platform and Recovery & Resilience Scoreboard, and the Romanian Fiscal Council (Consiliul Fiscal); 2021-2027 Cohesion and RRF/PNRR, drawdown to 2025. | ●●● |
| T4 | **INSCOP Research — December 2024 wave**<br>Opposition to leaving the EU/NATO; NATO and EU confidence, as reported by the Elcano Royal Institute. | ●●○ |
| T5 | **World / European Values Survey**<br>European Values Study, comparative interpersonal-trust module; used only as a directional read (no national point estimate). | ●●○ |

●●● representative / official · ●●○ indicative · ●○○ directional.

The Romanian Behavior Index is a product of The Listening Room — social intelligence lab. Frameworks: institutional & social trust theory; Eurobarometer trust series. Aggregate-only · GDPR-compliant by design · no individual profiling.

PILLAR 03 / 04 · Q2 2026

# Economy

For a decade Romanians called the economy bad while their spending powered its growth. In 2025 the spending finally stopped — consumption's contribution fell to near zero, the economy stalled, and the country met its oldest fear with the thinnest of cushions.

RBI-ECONOMY · 49.8/100 · EMERGENT

**NATIONAL SNAPSHOT** · ECONOMY · Q2 2026

# 49.8

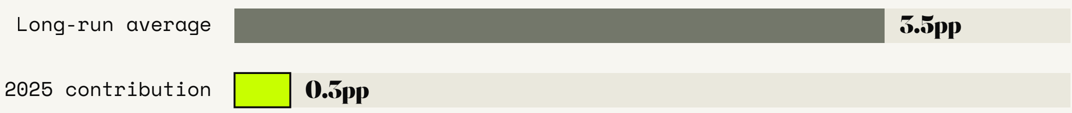
OUT OF 100

EMERGENT · RANGE 45–54

## The consumption engine cut out.

The household-resilience reading sits at 49.8 — grim sentiment (41) resting on a thin material buffer (57). The pillar's finding is a decade-long gap that just closed: Romanians always said the economy was bad; in 2025 their spending finally agreed.

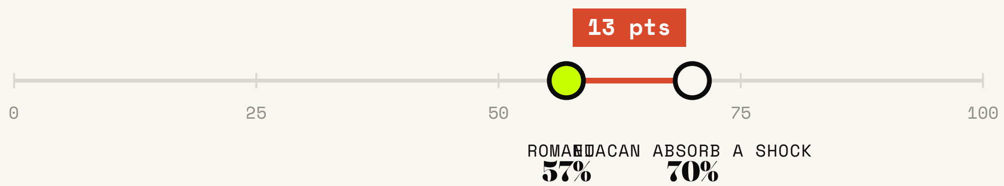
THE GAP THAT CLOSED — CONSUMPTION'S CONTRIBUTION TO GDP GROWTH (PP)



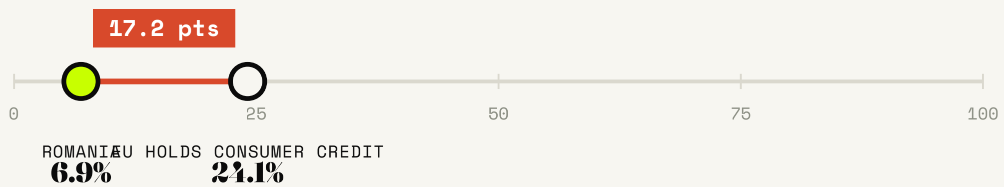

Long-run household-consumption contribution ~3–4pp; 2025 delivered 0.3pp. E4 · ING / national accounts. ●●○

AND TWO GAPS AGAINST THE EU — THE CUSHION BENEATH THE MODEL

GAP 01




GAP 02




Lime = Romania · hollow = EU average. Sources E1 (Eurostat SILC).

**ATTITUDE** · WHAT ROMANIANS DECLARE · ●●●

# Pessimism, finally vindicated.

Economic gloom is not new in Romania — it is close to a permanent condition. What is new is that the hard data has stopped contradicting it.


A clear majority, 59%, rate the national economy as bad, and around 70% say the country is on the wrong track. Tellingly, Romanians judge the EU economy more kindly than their own (39% call it good) — the same outward-facing confidence seen in the Trust pillar. The mood is not anti-market; it is a verdict on the national management of the economy.

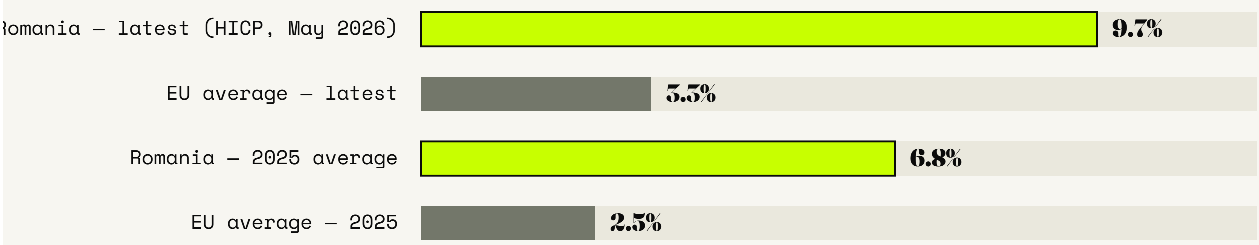
E2 Eurobarometer EB103, Spring 2025 ●●● · wrong-track: INSCOP, Jan 2026 ●●●.

**BEHAVIOUR & CONDITION** · WHAT THE NUMBERS DO · ●●●

# Highest inflation in the Union, thinnest cushion beneath it.

Two facts define the Romanian household's year: prices rose faster than anywhere else in the EU, and there was almost nothing set aside to absorb it.

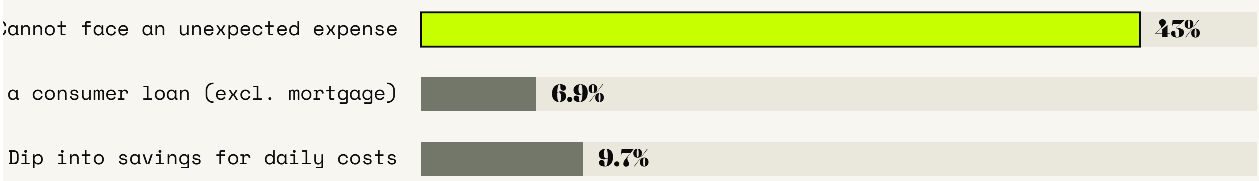
## Inflation — Romania vs. the EU




Romania has held the EU's highest inflation rate throughout — a 6.8% annual average in 2025 against 2.5% for the EU, and near 9.7% into 2026. Frozen public wages and pensions, higher VAT and the removal of energy caps compounded the squeeze on real income.

E1 · Eurostat HICP. ●●●

## The household has no buffer




Around **43%** of Romanians cannot cover an unexpected expense, among the EU's five highest in 2024 (down from a 47.3% peak in 2021). Only **6.9%** hold a consumer loan, the lowest share in the Union, while roughly **9.7%** dip into savings just to meet daily costs. Growth ran at 0.7% in 2025 and turned negative in the second half; unemployment rose from 5.3% to 6.3%.

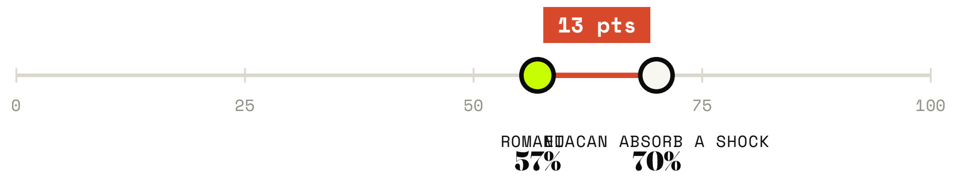
E1 Eurostat EU-SILC (inability to face unexpected expenses, 2024, ilc_mdes04; consumer credit 2020) ●●● · E3 EC/OECD/ World Bank ●●●.

**THE GAPS** · WHERE STRATEGY LIVES

# A model that depends on households that can't afford it.

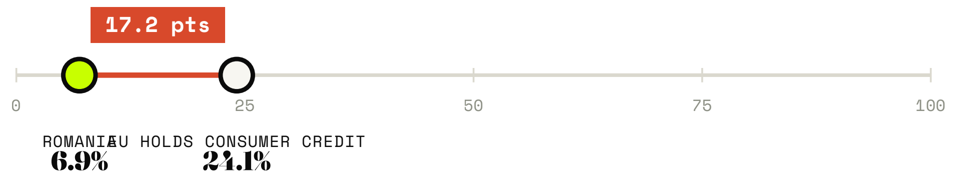
Household consumption is **63%** of Romania's GDP — one of the most consumption-dependent structures in the EU. The gaps below show the fragility underneath that dependence: a thinner shock buffer and far less formal credit than the EU norm. When incomes were squeezed in 2025, there was no slack to draw on, and the engine stalled.

GAP 01 · 13 POINTS · E1




**The most consumption-dependent economy sits on the thinnest household cushion.**

GAP 02 · 17.2 POINTS · E1




**A cash-bound financial life — little formal buffer, in either direction.**

SO WHAT — FOR THE PEOPLE WHO BUY THIS

**Brands & retail:** the Romanian consumer is trading down and delaying, not disappearing — value, essentials and payment flexibility matter more than aspiration in this phase. **Finance & policy:** the low credit and savings base is both a vulnerability and an opening — households carry little debt, so responsibly-designed, trusted financial products meet a genuinely under-served market rather than a saturated one.

**SIGNAL** · WHERE THE SQUEEZE BITES · THE QUARTERLY LAYER

# The pressure is uneven.

Inflation and fragility do not fall evenly. Food and energy — the categories that rose fastest — weigh most on lower-income, rural and older households, precisely those with the least buffer and the least access to credit to smooth the shock.

| MOST EXPOSED TO THE SQUEEZE | BETTER INSULATED |
|---|---|
| Lower-income & fixed-income (pensioners) | Higher-income urban employees |
| Rural households | Bucharest & large cities |
| Single-person & single-parent homes | Dual-earner households |

E1 · Eurostat SILC household-type breakdowns; HICP by category. Aggregate segments only. ●●●

WHAT MOVES NEXT QUARTER

Inflation, GDP and labour-market prints refresh monthly (Eurostat, INS, NBR); household-vulnerability cuts refresh annually. Between releases, the quarterly delta comes from The Listening Room's aggregate discourse layer — cost-of-living salience, category-level price anxiety and trading-down signals. No movement is asserted without a dated source behind it.

**METHODOLOGY** · INDEX CONSTRUCTION FOR THE ECONOMY PILLAR

# How the 49.8 was built.

The Economy sub-index is a household-resilience reading: one representative attitude (economic sentiment) and one material condition (the share able to absorb a financial shock), each a 0–100 share, combined as a disclosed weighted mean. Macro indicators (inflation, GDP, unemployment) are not folded into the score; they are reported directly and used to frame the gaps, because they are rates, not population shares, and mixing the two would be false precision.

| COMPONENT | SIDE | VALUE | WEIGHT | CONTRIBUTION | SRC | CONF |
|---|---|---|---|---|---|---|
| Economic sentiment (not rating economy bad) | Attitude | 41 | 0.45 | 18.45 | E2 | ●●● |
| Household buffer (can absorb a shock) | Condition | 57 | 0.55 | 31.35 | E1 | ●●● |
| | | | **RBI-ECONOMY** | **49.8** | range 45–54 | |

Ranges express uncertainty from mixed source confidence, not statistical confidence intervals.

## Limitations

The score rests on two inputs, so its band is deliberately wide. The buffer figure is a single point within the 40–44% band Romania's series has occupied (Eurostat 2024 places it among the EU's five highest, above 40%). Consumption contribution is bank-estimated (E4), flagged accordingly.

## Ethics & compliance

All inputs are official statistics or published representative surveys. The Listening Room's discourse layer is GDPR-compliant and aggregate-only: synthesised signal, never linked to an identifiable person.

SOURCES & PROVENANCE

# Every number, traced.

| REF | SOURCE | CONF |
|---|---|---|
| E1 | **Eurostat — HICP & household financial vulnerability**<br>Harmonised Index of Consumer Prices (HICP), annual average; inability to face unexpected expenses (EU-SILC, ilc_mdes04, 2024); consumer credit and use of savings (EU-SILC, 2020). | ●●● |
| E2 | **Eurobarometer — Standard EB103, Spring 2025**<br>Perceptions of the national and EU economy; Romania read. | ●●● |
| E3 | **European Commission / OECD / World Bank**<br>European Commission economic forecasts (2025), OECD and World Bank: real GDP growth and unemployment, 2024–2026. | ●●● |
| E4 | **ING Research / national accounts**<br>ING Research (consumption contribution-to-growth estimate); Eurostat/INS national accounts (consumption share of GDP). | ●●○ |

●●● representative / official · ●●○ indicative · ●○○ directional.

The Romanian Behavior Index is a product of The Listening Room — social intelligence lab. Aggregate-only · GDPR-compliant by design · no individual profiling.

PILLAR 04 / 04 · Q2 2026

# Work

Employers report a shortfall of hundreds of thousands of workers and fly in roughly a hundred thousand each year — while Romania holds one of the lowest employment and participation rates in the Union and remains one of the EU's largest labour exporters. The shortage is not of people. It is of participation.

RBI-WORK · 64.5/100 · ACTIVE

**NATIONAL SNAPSHOT** · WORK · Q2 2026

# 64.5

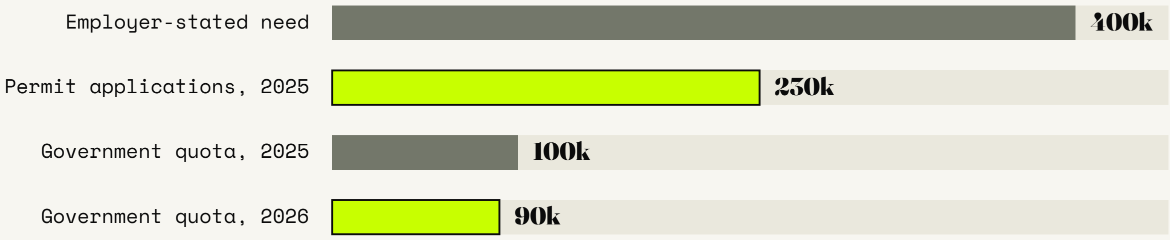
OUT OF 100

ACTIVE · RANGE 59–70

# A shortage in a country that isn't fully working.

Workforce engagement reads 64.5 — the highest score in this issue, and the most misleading. Most Romanians of working age are employed, yet the country runs below the EU on every participation measure, its workforce is shrinking, and it now imports the labour it cannot activate at home.

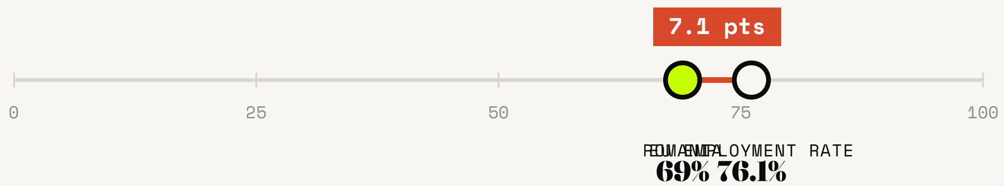
DECLARED DEMAND VS. THE ADMISSION CAP — THOUSANDS OF FOREIGN WORKERS



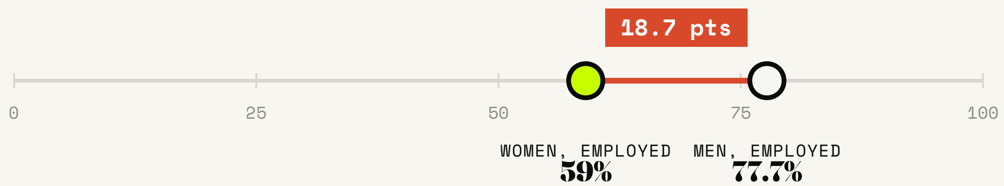

Employers put the real need above 400,000 and filed over 230,000 permit applications in 2025; the government held the quota at 100,000, then cut it to 90,000 for 2026. W2. ●●○

AND TWO GAPS AGAINST THE EU AND BETWEEN THE SEXES

GAP 01




GAP 02




Lime = Romania / the lower pole · hollow = the higher pole.
Sources W1 (Eurostat LFS).

**DECLARED DEMAND** · WHAT EMPLOYERS SAY · ●●○

# “The labour crisis is a reality.”

Ask Romanian employers and the story is unambiguous: they cannot find people. The evidence is in the paperwork — permit applications running at more than twice the government's cap, and a stated need four times larger still.

Shortages are named most often in construction, hospitality, courier and delivery, trade, agriculture and manufacturing. Employers requested a 2026 quota well above the ceiling; the government cut it instead, from 100,000 to 90,000, partly to hold jobs open for public-sector workers facing lay-offs. By the end of 2025, around **148,000** non-EU nationals held work-residence permits, roughly half from Nepal and Sri Lanka.

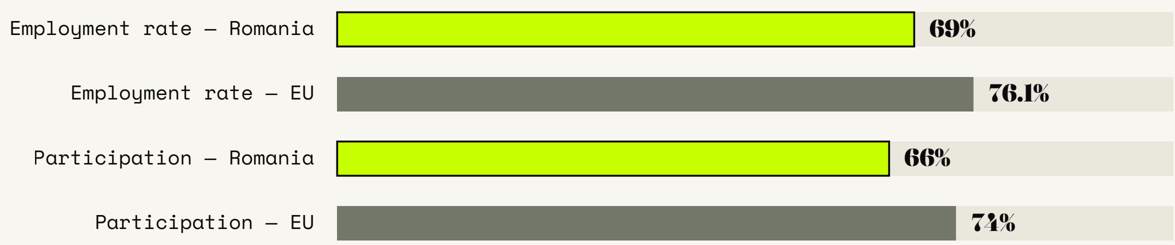
W2 · Romanian Ministry of Labour and IGI, reported via RRI, Transitions and Accace, 2025–2026. ●●○

**REVEALED** · WHAT THE MARKET IS · ●●●

# The workers are already here — just not working.

Set the shortage against the participation data and the paradox resolves. Romania does not lack people of working age; it fails to bring them into work at the rate its neighbours manage.

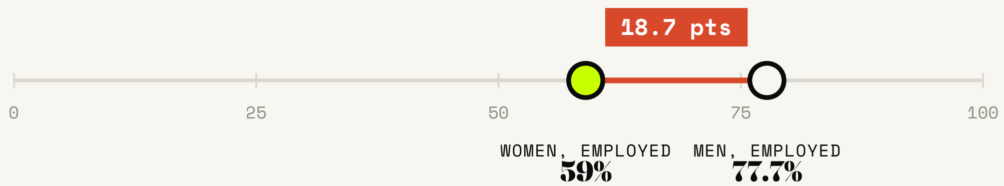
## Employment & participation — Romania vs. the EU




At **69%**, Romania's employment rate (20–64) is among the two lowest in the EU and more than seven points below the Union's 76.1%. Labour-force participation trails by a similar margin. That seven-point gap represents far more potential workers than the entire annual foreign-worker quota is designed to admit.

W1 · Eurostat LFS, employment 2025, participation 2023. ●●●

## The gender gap and a shrinking workforce




The single largest reserve of unused labour is women: fewer than **59%** are employed against nearly 77.7% of men — a 18.7-point gap, the second-widest in the EU. Meanwhile the working-age population is contracting: employment fell **3.5%** in 2025, the steepest drop in the Union, and only 24.1% of the employed are highly skilled — the EU's lowest share.

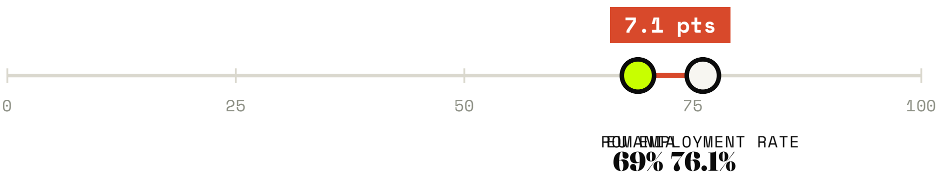
W1 Eurostat LFS ●●● · W3 OECD Romania 2025 ●●●.

**THE GAPS** · WHERE STRATEGY LIVES

# Exporting workers, importing a replacement.

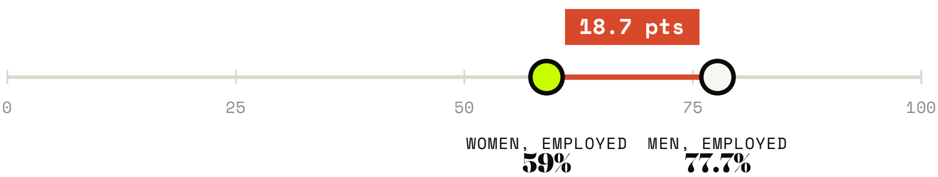
Romania is one of the EU's largest labour exporters, with millions working elsewhere in the Union, while it flies in roughly a hundred thousand non-EU workers a year to fill the jobs left behind. The shortage is real, but it is manufactured by participation, not by a simple absence of people: close the gaps below and the imported headcount is dwarfed.

GAP 01 · 7.1 POINTS · W1




**The shortage is a participation gap — and it dwarfs the annual foreign-worker quota.**

GAP 02 · 18.7 POINTS · W1




**Nearly one in five missing workers is a woman outside the labour market.**

SO WHAT — FOR THE PEOPLE WHO BUY THIS

**Employers & HR:** the fastest domestic reserve is not abroad — it is women, older workers and rural labour kept out by childcare, transport and rigid hours; flexibility reaches them before recruitment does. **Policy & investors:** imported labour is a patch, not a strategy — the structural lever is activation and retention, since even the workers brought in increasingly move further west.

**SIGNAL** · WHO IS LEFT OUT · THE QUARTERLY LAYER

# The unused workforce has an address.

Non-participation is concentrated, not diffuse. It sits with women — especially mothers and rural women — with older workers, the low-educated, and whole regions outside the capital.

| IN WORK | LEFT OUT OF WORK |
|---|---|
| Men; prime-age urban workers | Women, especially mothers & rural women |
| Bucharest-Ilfov (81.1% employed) | Poorer regions (national 69.5%) |
| Tertiary-educated | Low-educated & informal workers |

W1 · Eurostat regional & LFS breakdowns, 2024–2025. Aggregate segments only. ●●●

> The capital distorts the average: Bucharest-Ilfov employs 81.1% of its working-age adults, more than eleven points above the national rate. Romania's labour problem is, in large part, a map — activation is lowest exactly where opportunity is scarcest.

WHAT MOVES NEXT QUARTER

Employment, participation and permit data refresh quarterly (Eurostat, INS, IGI). Between releases, the quarterly delta comes from The Listening Room's aggregate discourse layer — hiring-difficulty salience, sector-level shortage signals and migration sentiment. No movement is asserted without a dated source behind it.

**METHODOLOGY** · INDEX CONSTRUCTION FOR THE WORK PILLAR

# How the 64.5 was built.

The Work sub-index is a workforce-engagement reading: the overall employment rate, weighted with the female employment rate that most drags it down. Both are 0–100 shares from the Labour Force Survey, combined as a disclosed weighted mean. Headcount figures (quotas, permits, stated demand) are reported directly, not folded into the score, because they are counts, not population shares.

| COMPONENT | SIDE | VALUE | WEIGHT | CONTRIBUTION | SRC | CONF |
|---|---|---|---|---|---|---|
| Employment rate (20–64) | Behaviour | 69 | 0.55 | 37.95 | W1 | ●●● |
| Female employment rate | Behaviour | 59 | 0.45 | 26.55 | W1 | ●●● |
| | | | **RBI-WORK** | **64.5** | range 59–70 | |

Ranges express uncertainty from mixed source confidence, not statistical confidence intervals.

## Limitations

This is the issue's highest score, and its most misleading in isolation: engagement is moderate in absolute terms while structurally constrained — below the EU, shrinking, and gendered. The number is read against the gaps, not alone. Participation (2023) and employment (2025) use slightly different age bases, flagged where combined.

## Ethics & compliance

Labour-market data are official statistics; foreign-worker figures combine government quotas with reported employer demand (W2), tiered accordingly. The Listening Room's discourse layer is GDPR-compliant and aggregate-only.

SOURCES & PROVENANCE

# Every number, traced.

| REF | SOURCE | CONF |
|---|---|---|
| W1 | **Eurostat — Labour Force Survey**<br>Eurostat Labour Force Survey: employment rate (20–64), labour-force participation, gender employment gap, workforce change, 2023–2025. | ●●● |
| W2 | **Romanian Ministry of Labour / IGI (immigration)**<br>Foreign-worker quotas and permits; employer demand (reported via RRI, Transitions, Accace). | ●●○ |
| W3 | **OECD — Reviews of Labour Market and Social Policies: Romania 2025**<br>Low participation, gender gaps, informality, adult-learning shortfall. | ●●● |

●●● representative / official · ●●○ indicative · ●○○ directional.

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**APPENDIX** · METHODOLOGY & SOURCES

# How to check this edition.

Everything below is stated so a reviewer can reconstruct the numbers without contacting us. Full provenance for every figure sits on each chapter's Sources page.

## Framework

**Attitude** — what people declare in representative surveys. **Behaviour** — what people and institutions do, from revealed statistics. **Signal** — quarter-to-quarter movement (see below).

## Index construction

Each pillar score is a weighted mean of named 0–100 share indicators. Weights are fixed in advance and printed in each chapter's methodology table. Scores are rounded to one decimal (half-up). Rates that are not population shares — inflation, GDP growth, headcounts — are reported directly, never folded into a score, to avoid false precision. The overall reading is the unweighted mean of the four pillars (47.6).

## Confidence tiers

●●● representative national survey or official statistic · ●●○ indicative (smaller, non-representative, or single-source) · ●○○ directional (comparative or qualitative; no national point estimate used).

## What a “gap” is

A gap is the distance between two measured quantities that should move together. They are not all say-versus-do. This edition uses several kinds, each labelled in its chapter: declared vs revealed (say/do); belief vs delivery; individual vs organisational capability; one group vs another; and Romania vs the EU.

## Ranges

Ranges express uncertainty from mixed source confidence, not statistical confidence intervals.

## The Signal layer — status

In this baseline edition every reported figure comes from a representative survey or an official statistic. The discourse layer contributes qualitative, aggregate context only — which topics are salient, which objections recur — and supplies no numeric figure here. Numeric quarterly deltas will be introduced only once its inputs and weighting are fixed and disclosed to the same standard as the survey backbone.

## Ethics

Aggregate-only; no individual profiling; public-actor observation limited to public signals; GDPR-compliant by design.

THE LISTENING ROOM

# The gap is the story.

The Romanian Behavior Index · Q2 2026 · Artificial Intelligence · Trust · Economy · Work. A quarterly reading of declared versus revealed behaviour, built only on representative, dated sources.