

THE LISTENING ROOM — SOCIAL INTELLIGENCE LAB

THE ROMANIAN BEHAVIOR INDEX

QUARTERLY

Q2 2026

·

PILLAR 02 — TRUST

Romanians trust the institutions that don't govern them — and believe in a Europe their own state struggles to deliver.

AGGREGATE -
ONLY
GDPR -
COMPLIANT
BY DESIGN
NO
INDIVIDUAL
PROFILING

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.

NATIONAL SNAPSHOT · TRUST · Q2 2026

41

OUT OF 100

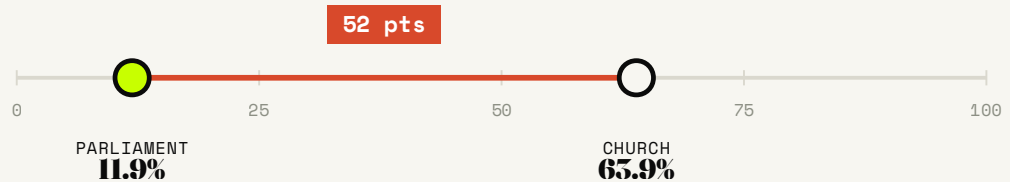
EMERGENT · RANGE 36-46

Romanians trust the institutions that don't govern them.

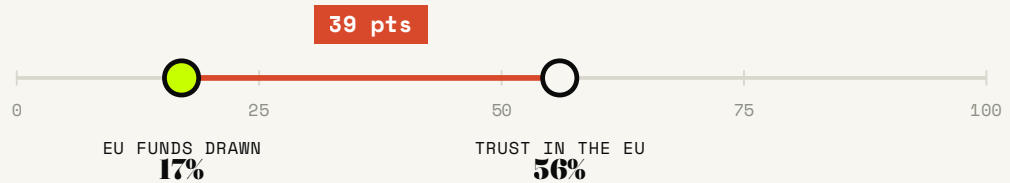
The composite reads 41, but the average conceals the finding: trust is bimodal. The Church, Army and EU command majority confidence; Parliament and Government sit near collapse. And delivery, the state's capacity to act on the European trust it enjoys, sits at just 17.

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

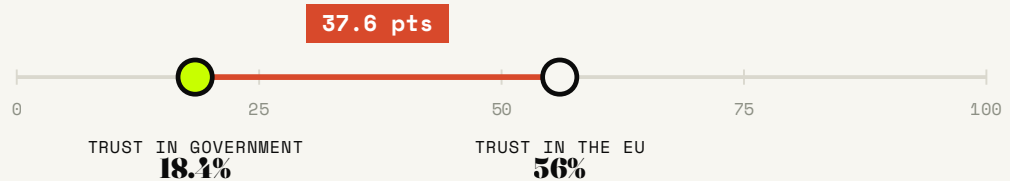
GAP 01



GAP 02



GAP 03



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.

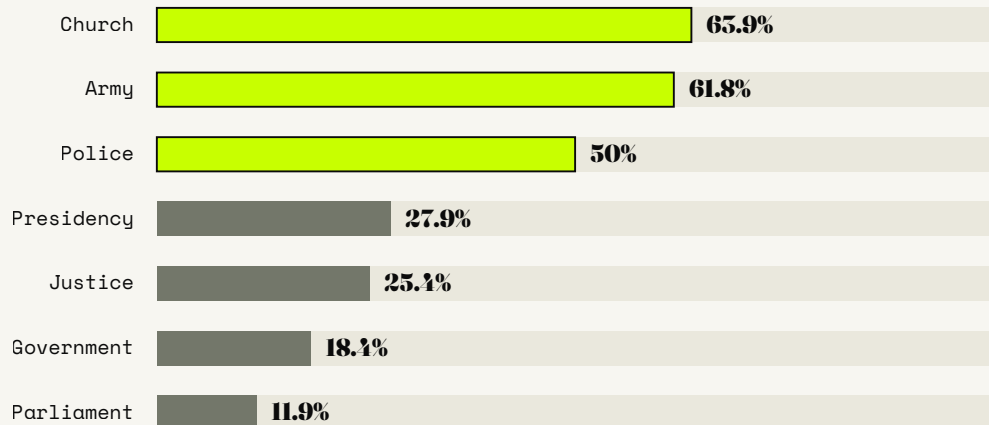
Lime marks the lower pole – the trust deficit or the delivery shortfall. Sources T1, T2, T3.

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.

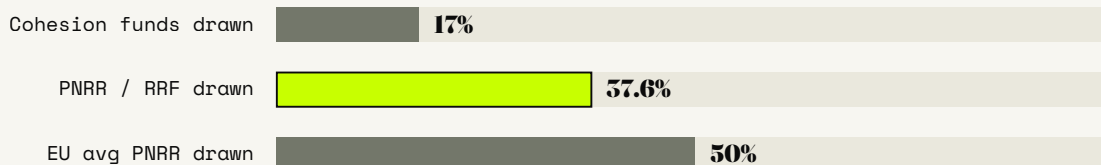
T2 Eurobarometer EB103, Spring 2025 ●●● · T4 INSCOP Dec 2024 (oppose EU exit, NATO) ●●○.

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.

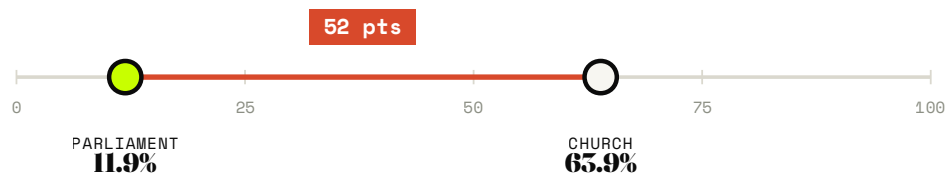
T3 · European Commission / Romanian Fiscal Council, drawdown to 2025. Cohesion absorption sits near a low EU average; the gap that matters is belief vs. delivery, not Romania vs. peers. ●●●

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

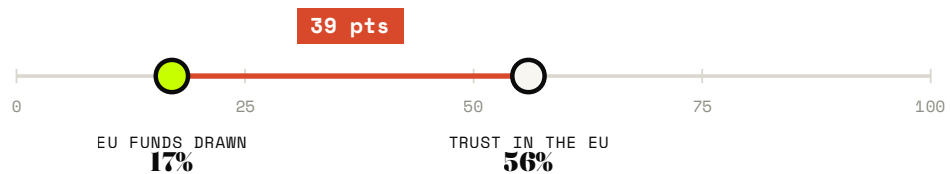
Three distances that define Romanian trust.

GAP 01 · 52 POINTS · T1



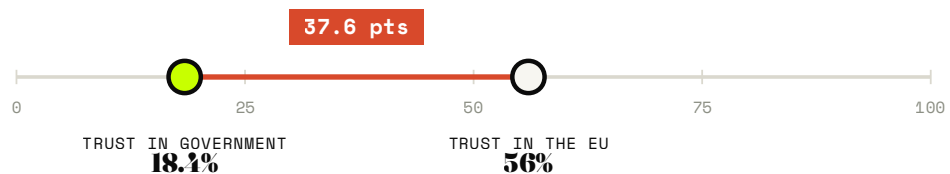
Trust flows to whoever doesn't govern.

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 National representative, CATI, n=1,100, ±3%, fieldwork 12-15 January 2026.	●●●
T2	Eurobarometer — Standard EB103, Spring 2025 EU-wide official survey; Romania trust in EU and membership benefit.	●●●
T3	European Commission / Romanian Fiscal Council 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 Opposition to leaving the EU/NATO; NATO and EU confidence, as reported by the Elcano Royal Institute.	●●○
T5	World / European Values Survey 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.

THE LISTENING ROOM

The gap is the story.

This issue — Pillar 01 AI · Pillar 02 Trust · next: Pillar 03
Economy · Pillar 04 Work.

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