

THE LISTENING ROOM — SOCIAL INTELLIGENCE LAB

THE ROMANIAN BEHAVIOR INDEX

QUARTERLY

Q2 2026

·

PILLAR 04 — WORK

A labour shortage of hundreds of thousands — in a country that isn't fully working, and keeps sending its workers abroad.

AGGREGATE -
ONLY
GDPR -
COMPLIANT
BY DESIGN
NO
INDIVIDUAL
PROFILING

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.

NATIONAL SNAPSHOT · WORK · Q2 2026

64.5

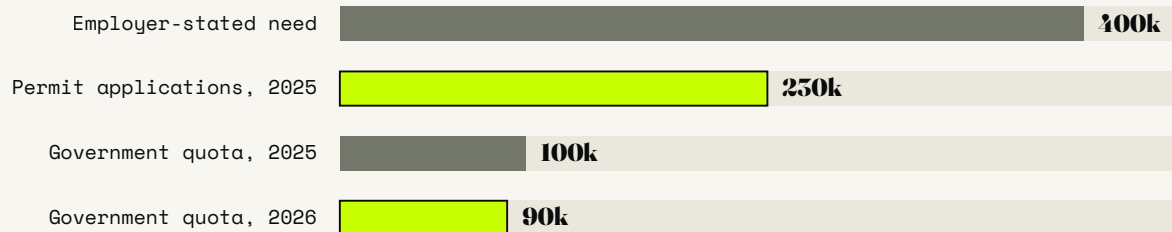
OUT OF 100

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



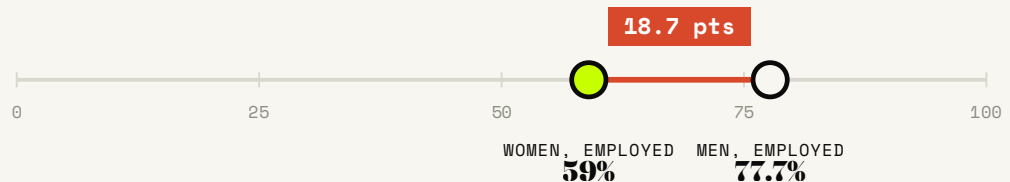
Employers put the real need above 400,000 and filed over 230,000 permit applications in 2025; the government held the quota at 100,000, then cut it to 90,000 for 2026. W2. ●●○

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.

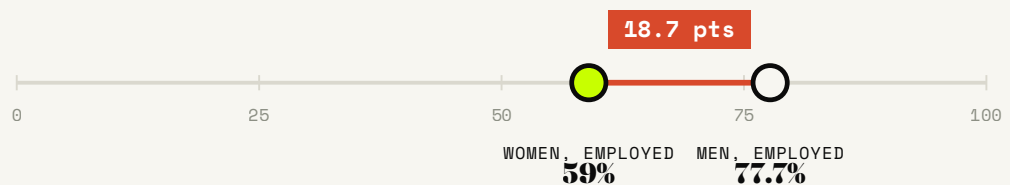
Employment & participation — Romania vs. the EU



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.

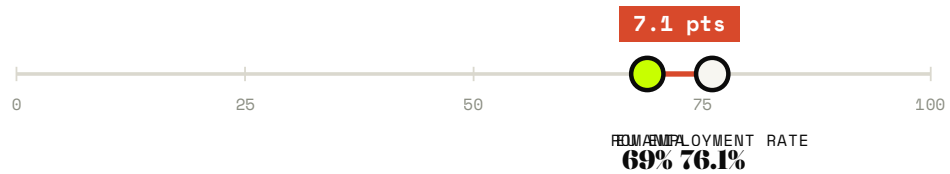
W1 Eurostat LFS ●●● · W3 OECD Romania 2025 ●●●.

THE GAPS · WHERE STRATEGY LIVES

Exporting workers, importing a replacement.

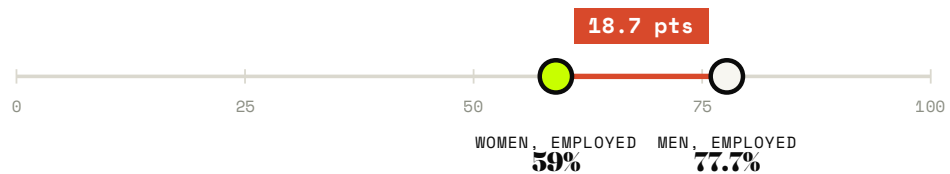
Romania is one of the EU's largest labour exporters, with millions working elsewhere in the Union, while it flies in roughly a hundred thousand non-EU workers a year to fill the jobs left behind. The shortage is real, but it is manufactured by participation, not by a simple absence of people: close the 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 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) Foreign-worker quotas and permits; employer demand (reported via RRI, Transitions, Accace).	●●○
W3	OECD — Reviews of Labour Market and Social Policies: Romania 2025 Low participation, gender gaps, informality, adult-learning shortfall.	●●●

●●● 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.

THE LISTENING ROOM

The gap is the story.

Q2 2026 — the full issue: Pillar 01 AI · 02 Trust · 03
Economy · 04 Work.

THE ROMANIAN BEHAVIOR INDEX · Q2 2026 · alexgeorgeadam.com