



Hopes and Fears

Romania 2025



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AI has significant potential to enhance both productivity and creativity, but many employees are not rushing to adopt it. This reluctance is determined mainly by fragmented implementation and the lack of training programmes tailored to the skill levels and responsibilities of different employee groups. In other words, some people see AI as something simply added onto existing processes, without real value. To unlock progress and fully capture the opportunity, organisations need a clear strategy for integrating AI, systematic and equitable training, and effective communication of the benefits it can deliver. Companies can start with practical, concrete AI use cases and give employees hands-on opportunities to experiment, particularly those in non-managerial roles, where confidence and adoption rates tend to be lower.

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Romanian employees are understandably paying more attention to legislative changes and geopolitical conflicts than technological developments, especially as 2025 has introduced numerous legislative and fiscal shifts that negatively impact companies and, by extension, their workforce. But there's a silver lining: those embracing AI are uncovering its benefits and can drive broader adoption. The future hinges on new technologies, and employees must adapt to meet the growing demand for AI skills.

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Key Findings

35%
of Romanian
employees say
they received a pay
raise in the last
year (compared
with 43% globally)

60%
say they
experience various
degrees of financial
strain

AI use among Romanian employees is one of the lowest of the 48 countries covered in the PwC Global Workforce Hopes and Fears Survey 2025. Similarly, Romanian workers are among the least excited about the way AI could affect their work.

Romanian workers are more concerned about how their job will be impacted by changes in government regulation (50%) and geopolitical conflicts (43%) than technological change - including AI (39%) in the next three years.

The answers of Romanian employees point to better understanding and alignment with company goals, safer and more supporting working environment and higher confidence in experimenting and expressing opinions compared with the global sample.

Workers in Romania seem to be less satisfied about their work than the global average, but more inspired.

Only 35% of Romanian employees say they received a pay raise in the last year (compared with 43% globally) and about 60% say they experience various degrees of financial strain.

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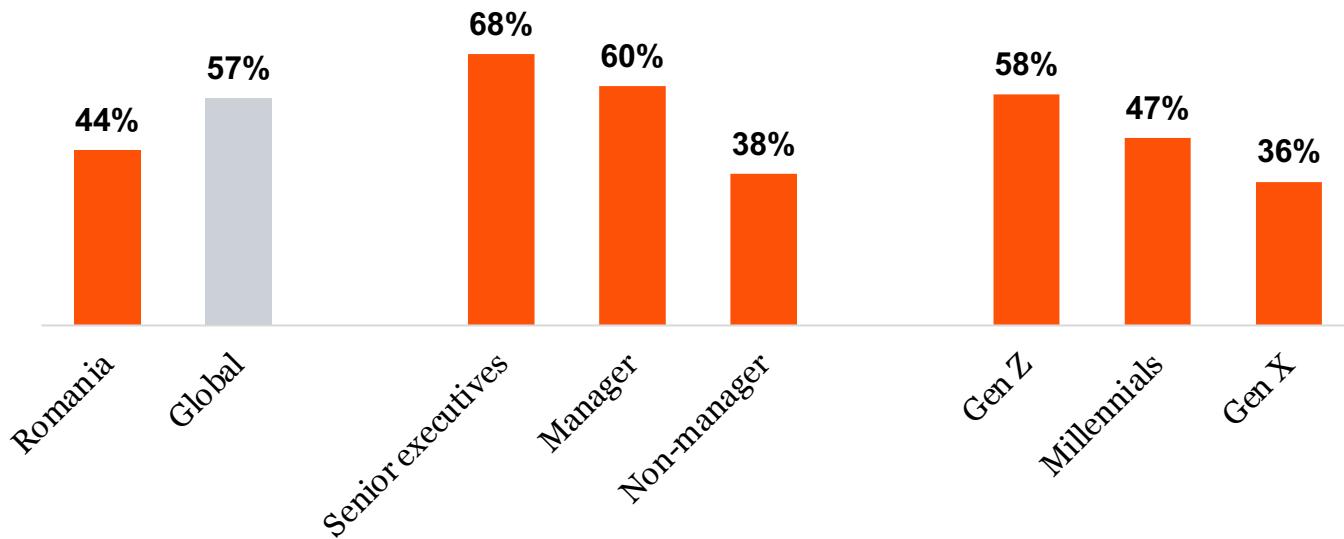
Introduction: Romanian employees lag on AI adoption despite benefits

Romanian workers are navigating AI-era change with a mix of optimism and pragmatism, shows the PwC Global Workforce Hopes and Fears Survey 2025. Local AI adoption for work is still lagging behind the global rate, but employees who've used it already see value – higher work quality, gains in creativity, and higher productivity.

Across Romania's workforce, which spans from senior management to the front line, only 44% say they've used AI for their jobs in the past year (including 2% who are unsure), significantly below the global average of 57%. Romania ranks among the bottom ten of the 48 countries covered by the survey in terms of AI use for work.

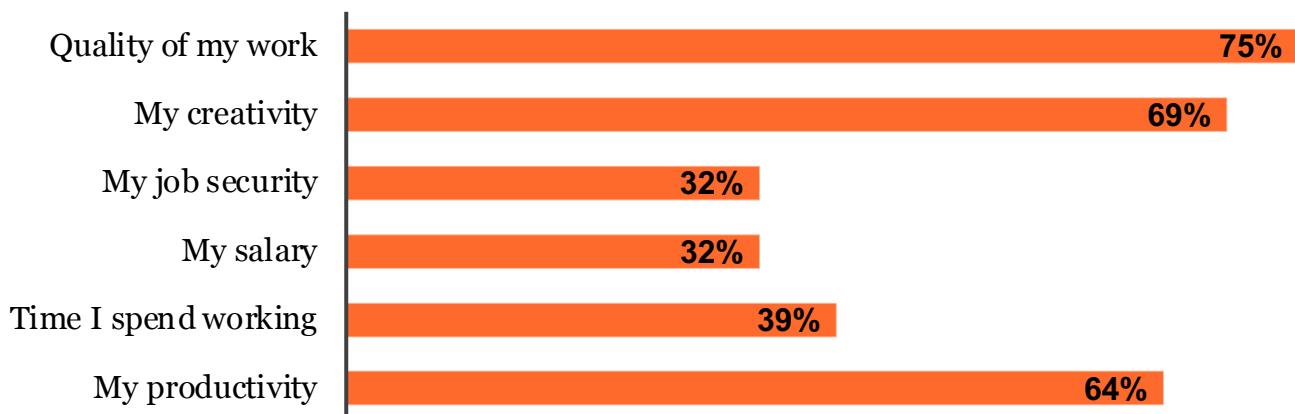
As expected, Gen X is less keen to adopt new technologies as compared to Millennials and especially GenZ. On the other hand, surprisingly a larger percentage of management uses AI as compared to non-managers, one of the causes being probably also the broader access rights.

Have you used AI in your job in the last 12 months?



Among the local AI users, the reported benefits are clear: about three-quarters say AI has improved the quality of their work (75%) and roughly seven in ten cite gains in creativity (69%). Productivity improvements are also widespread (64%), though more modest than quality gains. Again, senior executives and managers are more likely to say they've seen benefits from AI use than non-managers.

In the last 12 months, to what extent did AI increase or decrease the following aspects of your job? (Increase)

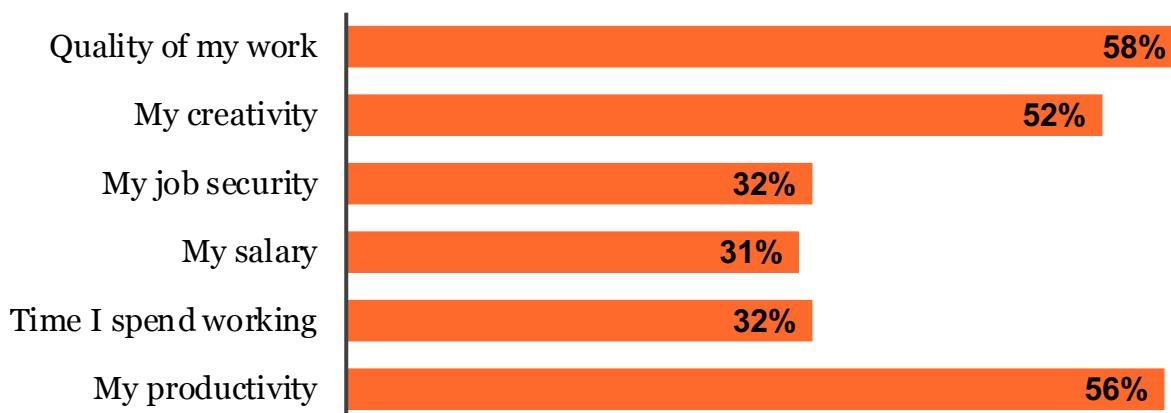


Sample: Only the workers that said they used AI in the last 12 months

*This data is for Romania only

Looking ahead, many expect further upside from AI over the next three years: 56% of all Romanian respondents anticipate higher productivity, 58% expect better quality, and 52% foresee gains in creativity. Smaller shares expect increases in salary (31%), job security (32%), or time spent working (32%).

In the next three years, to what extent do you believe AI will increase or decrease the following aspects of your job? (Increase)

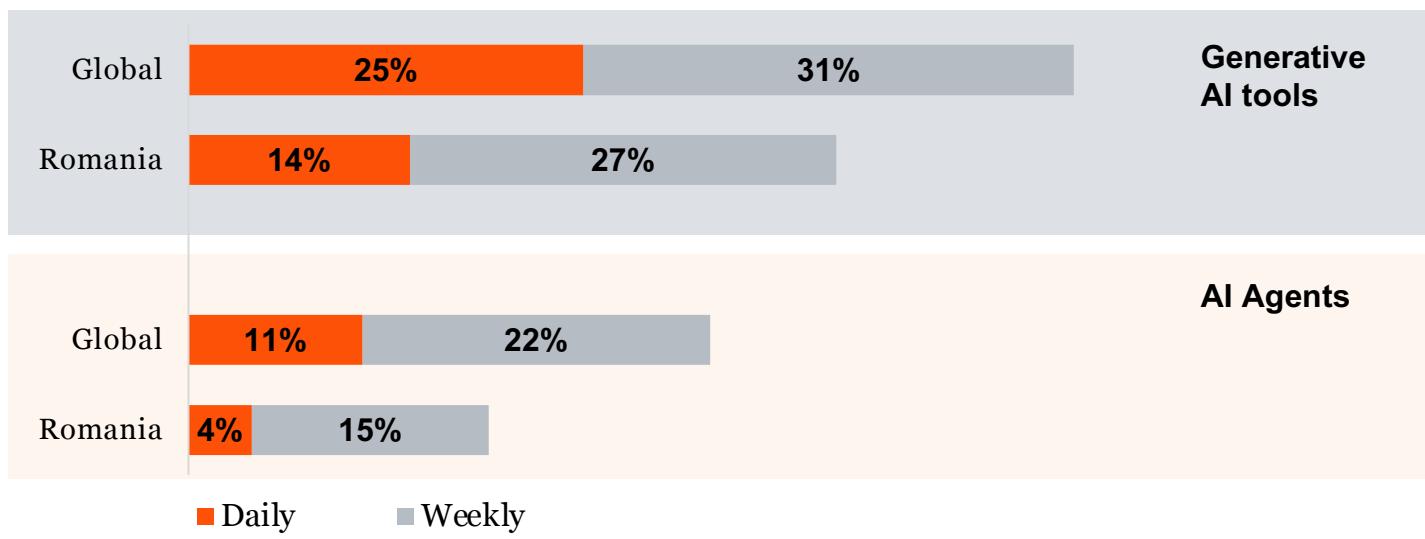


Sample: All the workers

*This data is for Romania only

Despite growing awareness about AI, day-to-day use remains limited. Among Romanian AI users, only 14% say they use generative AI daily - equating to roughly 6% of the total workforce, less than half of the global share of 14% of the total respondents. Daily use of AI agents is even less common: about 4% of AI users (around 2% of all workers) report using them every day.

In the past 12 months, how frequently, if at all, have you used the following technologies at work? | 1. Generative AI tools (e.g., ChatGPT, DALL-E) | 2. AI Agents

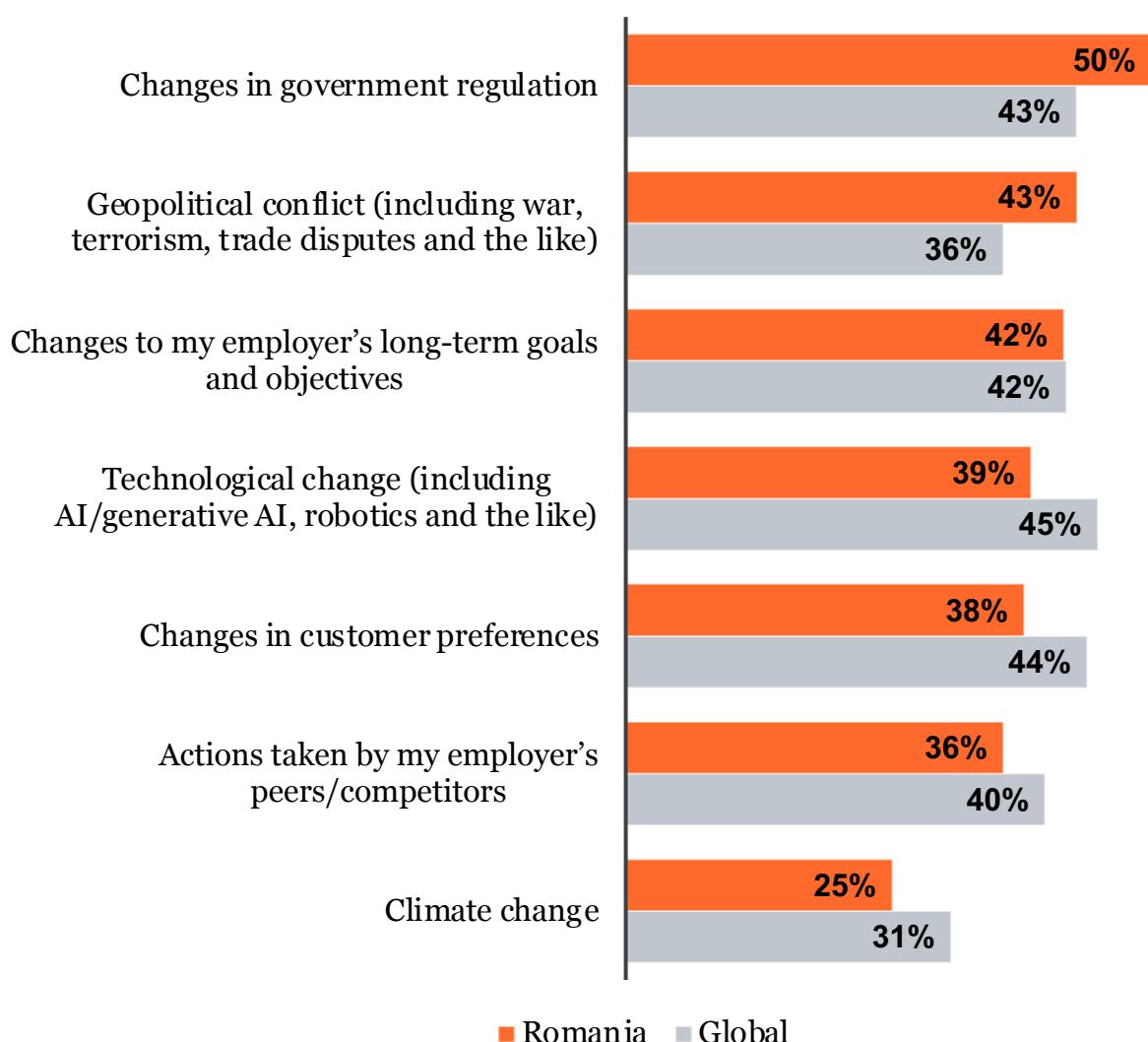


Sample: Only the workers that said they used AI in the last 12 months



Globally, technological change (including AI/generative AI, robotics and the like) is seen as the main disruptor on the labour market, as 45% of the respondents see it as having a large or very large impact on their jobs. Meanwhile, across the Romanian workforce, only 39% expect technological change to significantly affect their jobs in the next three years, a notably lower share than those who expect an impact from the changes in government regulation (50%) or geopolitical conflict (43%).

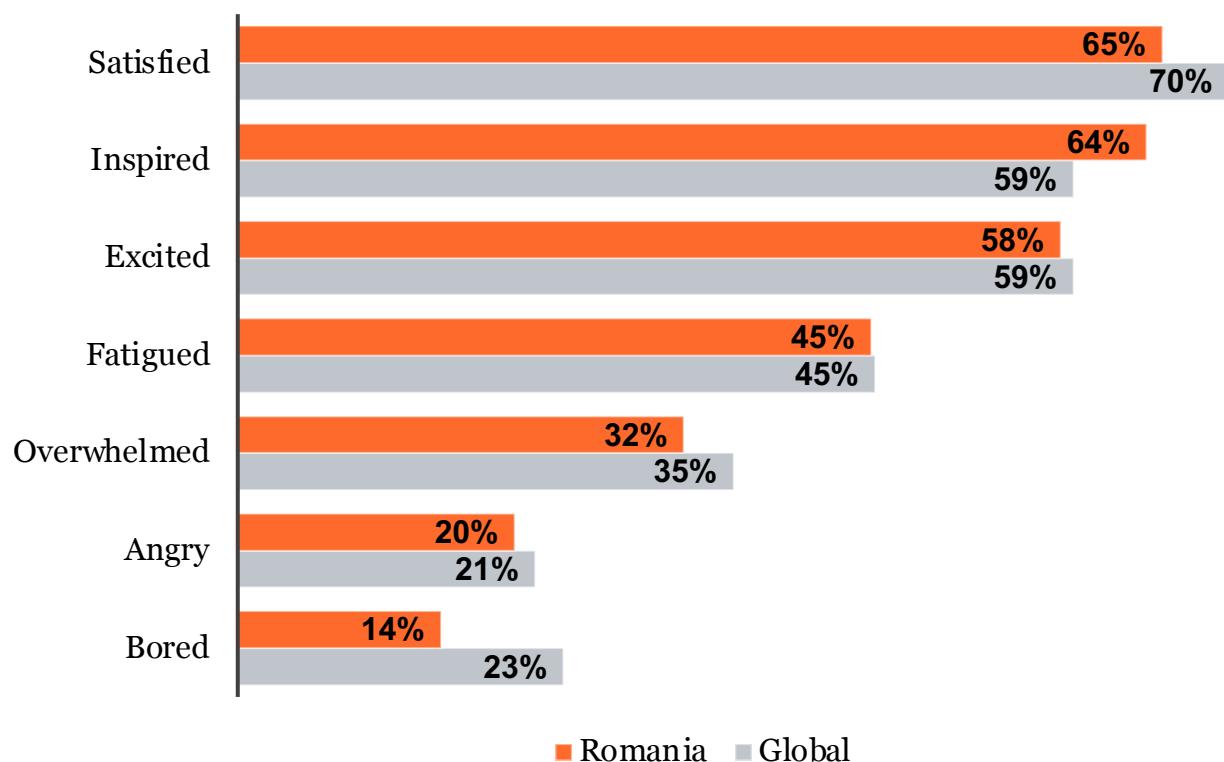
In the next three years, to what extent, if any, do you think each of the following will impact your job? (To a large extent / To a very large extent)



For employers, these findings are a clear call to action: help workers understand, adopt and embrace AI's transformative potential. Focus on practical use cases that lift quality and creativity (where employees already see gains), then build toward measurable productivity outcomes. Provide guidance, guardrails, and time to experiment - especially for non-managers, who lag in adoption and confidence, and for functions that have not yet embedded AI into daily workflows.

Uncertainty about AI's effects exists alongside a workplace where many employees are energized, but signs of strain are present. In Romania, 65% say they feel satisfied at work at least once a week, including 22% who feel satisfied daily. Weekly or more frequent feelings of inspiration (64%) and excitement (58%) are also common. At the same time, 45% report feeling fatigued at least weekly, 32% feel overwhelmed, 20% feel angry and 14% feel bored. This underscores the need to pair AI adoption with trust, alignment and psychological safety so employees feel supported through change.

How often do you have the following feelings at work? (At least once a week)



The payoffs are greatest when organisations build trust, nurture skills, and offer meaningful work, strategic alignment, and psychological safety. Taken together, the results suggest leaders should co-create the future with their people: scale the AI use cases that already deliver value, expand access to learning and experimentation, and strengthen the cultural foundations that keep employees confident and motivated through disruption.

01

Acknowledge the uncertain future of work, particularly for entry-level workers

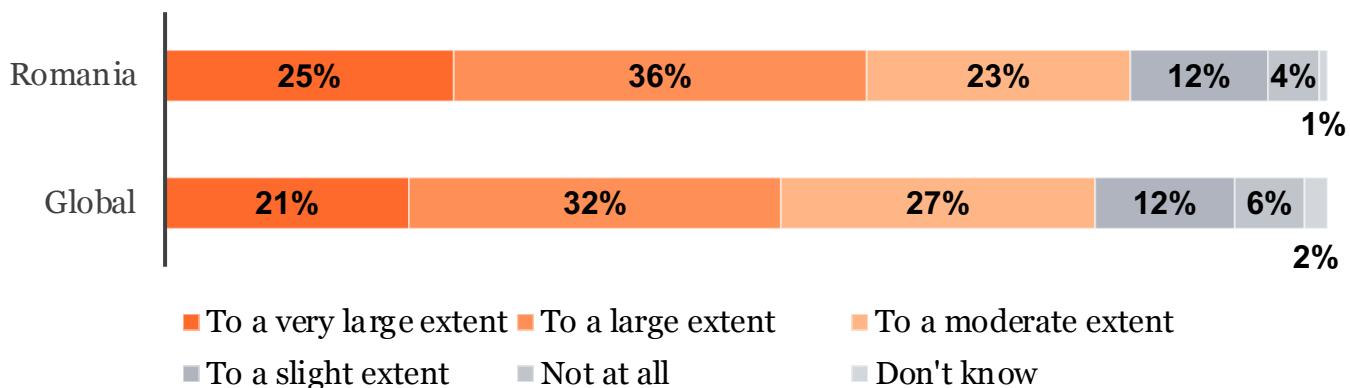
Job security and optimism about the future of their roles are top motivators for workers. But today's uncertain environment represents a challenge for management, given the scale of disruption. Step one: acknowledge the uncertainty.

Romanian workers seem less concerned about the business climate they face than their counterparts in other countries: 60% say they feel strongly optimistic about the future of their roles, compared to a global average of 53%. Even among entry-level workers, confidence is high for 59% of the Romanian respondents versus 44% of global respondents. This may indicate that Romanian employees are not yet fully aware of the challenges coming together with the new technological revolution.

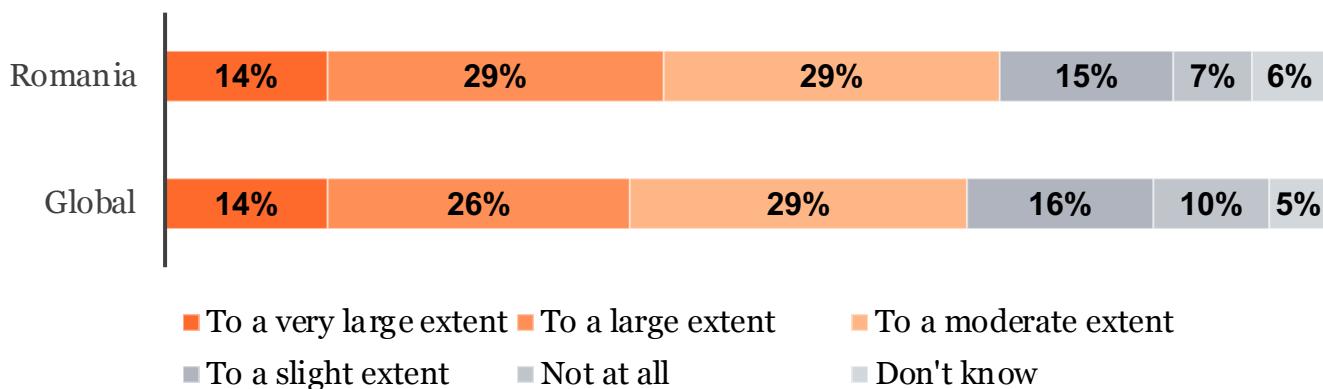
About 72% of Romanian employees believe they will have at least a moderate amount of control over the way technology affects their work during the next three years, including 43% who say they will have control to a large or very large extent. Only 7% say they will have no control.



To what extent are you optimistic about the future of your role within the organisation?



Over the next three years, to what extent will you have control over the ways technology affects your work?



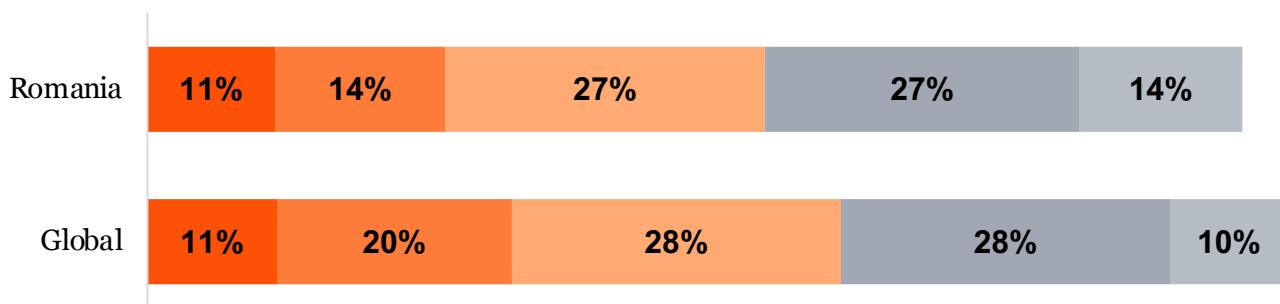
Romanian workers' emotions about AI reflect this mix of promise and caution. Almost half (49%) feel curious about AI's impact on their work (global share is 50%), but only 33% feel excited, significantly below the global average of 41%. Meanwhile, 24% feel worried and 21% feel confused.

To what extent, if at all, do you feel the following emotions about how AI may affect your work? (To a large extent / To a very large extent)



Uncertainty is especially acute when it comes to the hotly debated question of AI's impact on entry-level jobs. Among managers in Romania, 41% believe AI will reduce entry-level roles in their organisation over the next three years while 25% expect an increase. Relative to the global picture, Romanian managers are somewhat more likely to anticipate reductions (41% vs 38%) and less likely to expect increases (25% vs 30%).

What impact do you think AI will have on entry-level roles in your organisation over the next three years?



- Significantly increase the number of entry-level jobs available
- Somewhat increase the number of entry-level jobs available
- Have little or no effect either way
- Somewhat reduce the number of entry-level jobs available
- Significantly reduce the number of entry-level jobs available



Where to focus

Leaders need to acknowledge the limitations of their foresight and the scale of the technological forces at work. Openness won't create security, but it can pave the way for shared understanding and solutions. These issues are particularly acute with respect to entry-level workers. For companies hiring university students, the opportunity starts with being explicit during recruiting events about which entry-level needs are clear and which remain uncertain.

Once new hires start, companies should be tapping into their status as digital natives with AI knowledge and experience gained from school and work with them to find the best use of their digital skills.

02

Address trust gaps

Trust in management is critical for motivation, but it's uneven across the workforce. When employees doubt their leaders, energy and focus drain away. And as organisations race to integrate AI and other new technologies, anxiety and uncertainty among workers increase. In a turbulent job market, where churn is high and employees may feel vulnerable, trust in leadership can become a critical stabiliser.

In Romania, trust in senior leadership is just over half: 56% moderately or strongly agree they trust the top management of their organisation (vs 51% global). Employees place slightly more faith in their direct managers: 58% say they trust their manager (on par with the global result), and 62% say they can speak openly with their manager (vs 59% global).

Trust grows from reliability. Romanian workers do see leaders following through, but there is room to improve: 58% say their direct manager does what they say they will do (vs 55% global), and 55% say the same of top management (vs 50% global). There is also a gap on leaders' care for workers' well-being. Only 46% say their direct manager cares about their well-being (vs 52% global), while 49% say top management cares (vs 46% global).

Comfort in speaking openly with managers is comparatively strong overall (62% in Romania vs 59% global), but it's not uniform: younger workers report less comfort than older cohorts. Among Gen Z, 56% say they can speak openly with their manager, rising to 59% among Millennials and 69% among Gen X.



To what extent do you agree or disagree with the following statements about your manager | the top management of your organisation? (Moderately agree / Strongly agree)



*This data is for Romania only



When it comes to AI and the workforce, there's a great deal of anxiety and, of course, a barrage of information for employees to sort through. It's also important to recognise that what executives see as reallocating skills, employees experience as a threat to their jobs and expertise.

If workers are to make greater use of AI to improve productivity, creativity, and quality, leaders will need to keep strengthening trust - both in people and in the technology - by demonstrating reliability, showing care for well-being, and fostering open dialogue. The data suggest a clear path: sustain transparency and follow-through at the top, close the "care gap" at the frontline, and ensure younger employees feel safe to speak up.

03

Inspire employees with a clear vision of the future

Employees are more motivated when they understand their organisation's goals and believe they're attainable. A standout finding of our survey is that workers who feel most aligned with leadership goals are far more motivated than those with the least alignment.

In Romania, many leaders are getting this right: 72% of employees say they understand their organisation's long-term goals and objectives, compared with 64% in the broader global workforce. Day-to-day alignment is also high in Romania, with 70% saying their work is aligned with those goals (vs 61% global). However, workers are somewhat less likely to say they believe in their organisation's long-term goals and their leadership team's ability to achieve them. In Romania, 66% say they believe in the long-term goals (vs 60% global) and 62% say the leadership team can lead the organisation to achieve them (vs 56% global). Misunderstanding and misalignment are greater among non-managers than managers.



Thinking about your organisation's long-term goals and objectives, to what extent do you agree or disagree with the following statements? (Moderately agree / Strongly agree)



The implications for leaders in Romania: create a vivid picture of what the company will look like a few years from now and describe how those outcomes relate to employees' day-to-day work and longer-term career development.

The opportunity is to set your company's AI story in the context of a clear management narrative about long-term corporate goals and how they'll create a better future for the company and its employees.

Articulating a consistent vision and linking it to achievable milestones can help build confidence and credibility, and avoid leaving a vacuum for fear or hype to fill.

04

Create skill pathways

Workers who believe their skills will remain relevant over the next three years are almost twice as motivated as those who think their skills will have no relevance. And workers who feel supported to upskill are more motivated than those who report the least support, which makes access to learning one of the strongest predictors of motivation.

Encouragingly, 65% of Romanian employees say they learnt new skills at work in the last 12 months that are helping their career (vs 56% globally), and 64% say they have access to the learning and development resources they need (vs 59% globally). At the same time, support from managers to build new capabilities stands at 60% (vs 57% globally).

Yet in Romania, as elsewhere, upskilling support is uneven: 80% of senior executives and 71% of managers feel supported in learning new skills, compared with 55% of non-managers. The access gap is smaller when it comes to learning resources (71% among senior executives and 71% among managers vs 62% among non-managers).



To what extent do you agree or disagree with the following statements? (Moderately agree / Strongly agree)



There are many ways for employers to address workers' frustration about receiving too little upskilling or too few chances to demonstrate existing skills. The advance of AI makes this imperative even more urgent: leaders should spell out which skills matter most in the future, connect them to business strategy, and create visible, equitable upskilling pathways.

But just providing those pathways isn't enough: without opportunities to test and apply new capabilities on the job, and without consistent manager support, employers risk losing much of the value of upskilling.

05

Motivate to innovate and reinvent

Motivation thrives where employees feel safe and find meaning in their work. These cultural drivers are as critical as technology or skills to sustaining performance and driving innovation, especially in an environment of uncertainty and rapid change.

In Romania, more than half of employees say it's safe to try new approaches in their workplace (59%), and a similar share say their team treats failures as opportunities to learn and improve (56%). Team climate is broadly supportive: 68% feel comfortable sharing honest opinions and ideas about work with their team and 70% say their team supports them if they ask for help or advice.

Variation by level underscores differing innovation pathways and risk appetites. Management-level workers report notably higher psychological safety than non-managers. For example, 74% of senior executives and 72% of managers say it's safe to try new approaches, compared with 54% of non-managers. And when it comes to support, 79% of managers and 80% of senior executives say their team backs them if they ask for help, versus 66% of non-managers. Interestingly, Gen X workers are more likely to feel safe and supported in their work environment than younger generations.



To what extent do you agree or disagree with the following statements about your current work team? (Moderately agree / Strongly agree)



Our research on meaning at work reveals similar links to worker motivation. In Romania, 60% say they have found a meaningful career, 63% say their work contributes to their personal growth, and 60% say their work makes a positive difference in the world. Percentages are higher than the global ones for all the three questions. Managers are far more likely than non-managers to report meaning and growth.

To what extent do you agree or disagree with the following statements? (Moderately agree / Strongly agree)





To mobilise the workforce behind reinvention, there are several steps leaders can take. One is to actively reallocate staff, which is not only associated with higher profitability but also energises your people if done well. A skills-first approach can help allocate talent where you need it and boost employee motivation.

High-performing HR functions can play a significant role, and today's leaders need to demand that they do. Consider psychological safety: its importance as a motivator suggests leaders should be doubling down on it at a time when technological disruption is creating uncertainty about the future.

HR leaders also can stimulate dialogue about personal meaning and incorporate corporate purpose into employee goal-setting processes. And they can use technology to enhance the employee experience, eliminating motivation-dampening annoyances.

Another tactical step for leaders is to make experimentation safer. Innovation depends on leaders showing that failure isn't the end point but part of the process as they look to build a culture where employees feel comfortable trying new things. Senior leaders should give managers clear guidance on how to reinforce this mindset on a day-to-day basis, framing setbacks as opportunities to adapt rather than mistakes to punish.



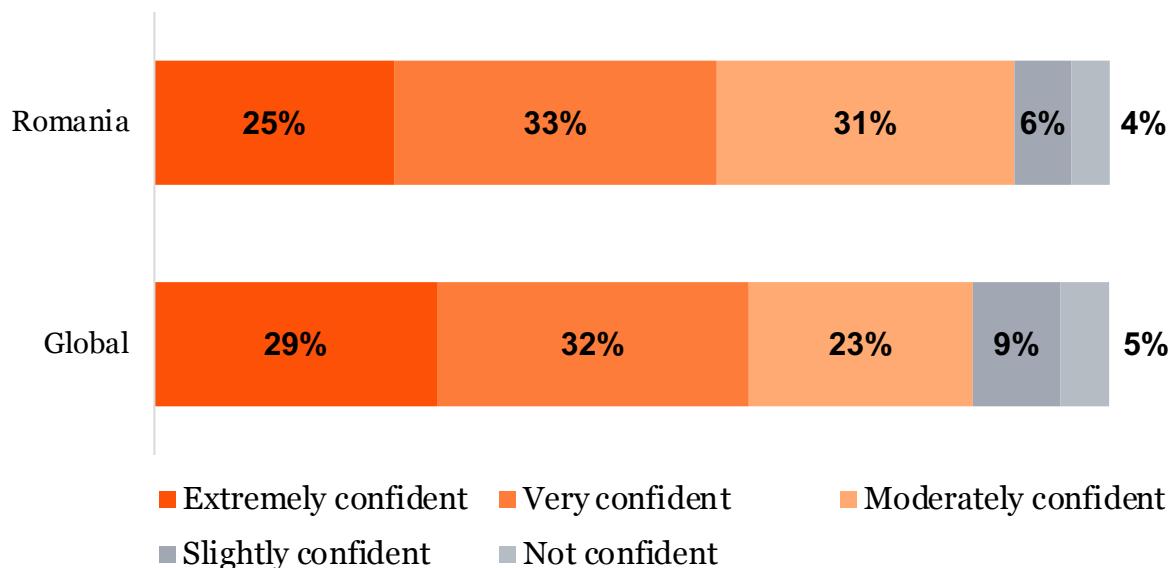
06

Treat security and pay as core motivators

Job security and financial well-being are critical to motivation. Workers who feel their job is secure are about 50% more motivated as those who are not.

In Romania, 58% of employees are very or extremely confident about their job security in the next 12 months, compared with 62% in the global survey. Obviously, managers feel more confident (67%) than non-managers (54%).

How confident are you about your job security over the next 12 months?

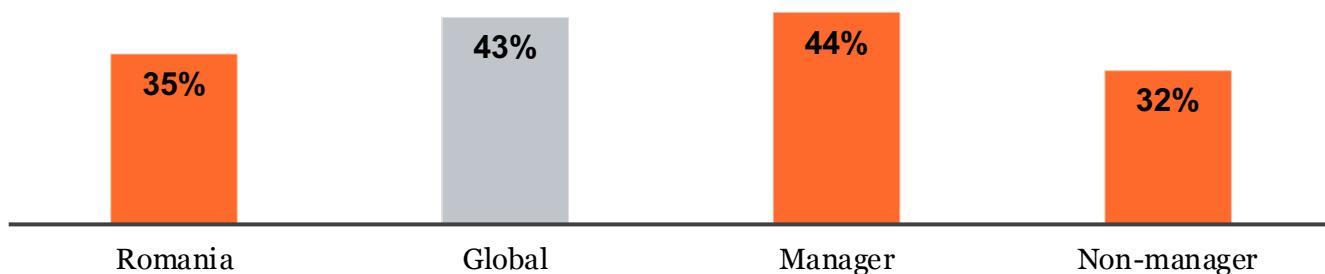


Pay is an important piece of the puzzle. In Romania, only 35% of employees received a pay raise in the past year (vs 43% globally), and those who didn't see a pay boost are markedly less likely to feel satisfied, inspired, or excited at work. For employers, that's potentially a barrier to readiness for change.

We also find that financial strain is widespread. In Romania, 9% of workers struggle to pay their bills each month and 1% cannot pay them most of the time, while a further 50% pay their bills with little or nothing left over for savings. Collectively, about 60% of the local workforce experiences financial strain (vs 56% globally).

Workers under financial pressure are often less trusting, motivated, or candid. Without that trust, employees are less likely to believe leaders' narratives about AI or feel supported through disruption. They're also less comfortable speaking openly.

Received a pay raise in the last 12 months



My household is able to pay all bills every month and has enough left over for savings, holidays and extras



In addition to motivating workers with money and seeking to avoid demotivation through insecurity, executives can link employees' financial goals to a drive for AI adoption and value creation.

AI skills now carry a premium. PwC's AI Jobs Barometer shows AI is making workers more valuable. In this research, we compared the wages of workers in a given occupation who differed only on whether they have AI skills. On average, workers with AI skills earned a 56% wage premium, more than double last year's gap.

Beyond helping employees boost their value by building their AI skills, employers can take some simple steps to bolster financial wellness—and demonstrate care for their teams on this key topic. For example, employers can provide objective, trustworthy resources such as coaching, workshops, webinars, and online tools—which previous PwC research shows workers increasingly value.



Conclusion

The leadership challenge is not only to deploy AI, but also to ensure workers feel prepared, motivated, and aligned to embrace it. Our survey shows motivation is strongest when employees see a future for themselves and have access to learning; believe in management and its priorities; experience meaning, psychological safety, and positive emotions at work; and feel financially rewarded. These aren't new priorities, but they're even more important as leaders seek to energise their employees for the future of work. With trust, clarity, and cultural support, today's uncertainty can become tomorrow's AI readiness.

About the survey

PwC Workforce Hopes and Fears Survey 2025 is one of the most comprehensive studies of the global workforce, with nearly 50,000 respondents from 48 countries and 28 industries. The Romanian data reflects the responses of 500 employees across the country, statistically representative in terms of employment status, age, education, location, industry and profession.



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