



THE
QUANTUM
SPACE

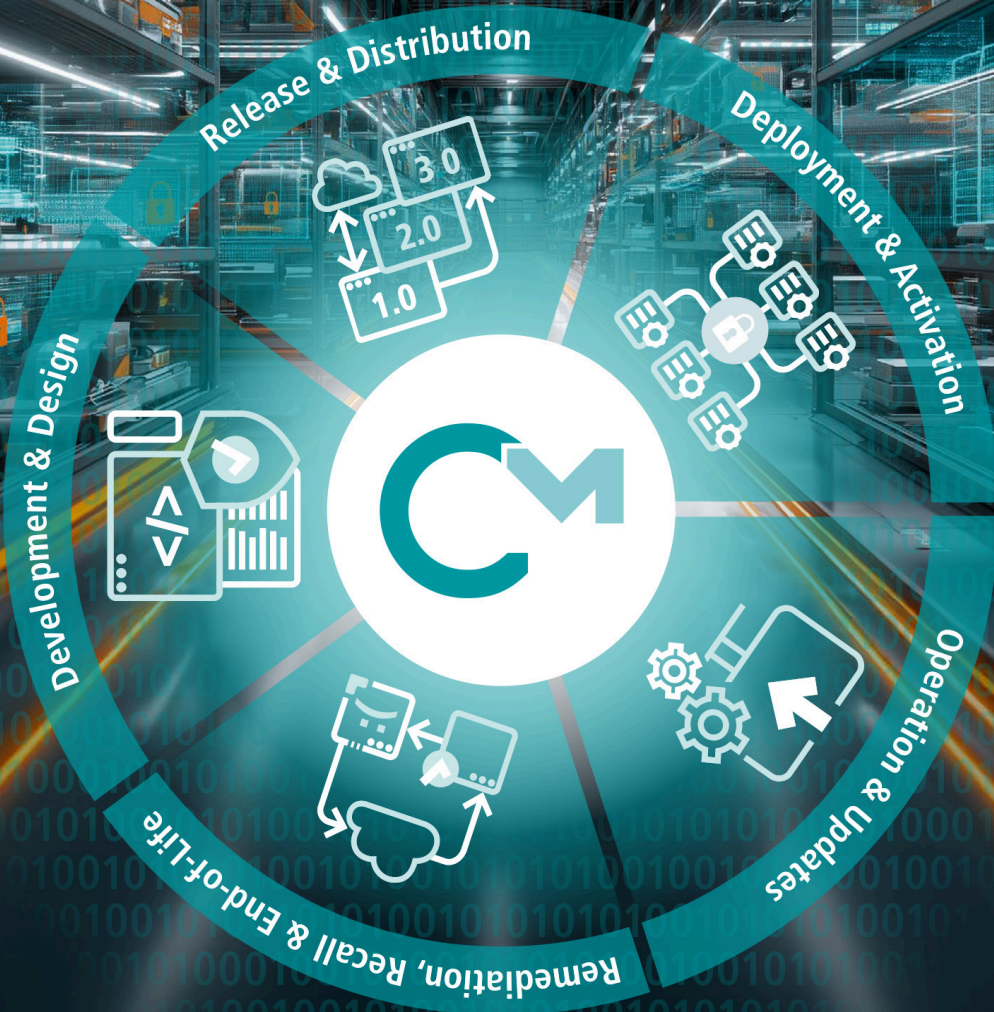
Trusted Steps. Quantum Leaps.

STATE OF QUANTUM 2026

INDUSTRY AHEAD.
MARKET BEHIND.

OCTOBER 2026
thequantumspace.org

HARDWARE | INFRASTRUCTURE | SUPPLY CHAIN | INVESTMENT | ADOPTION | COMMERCIAL REALITY



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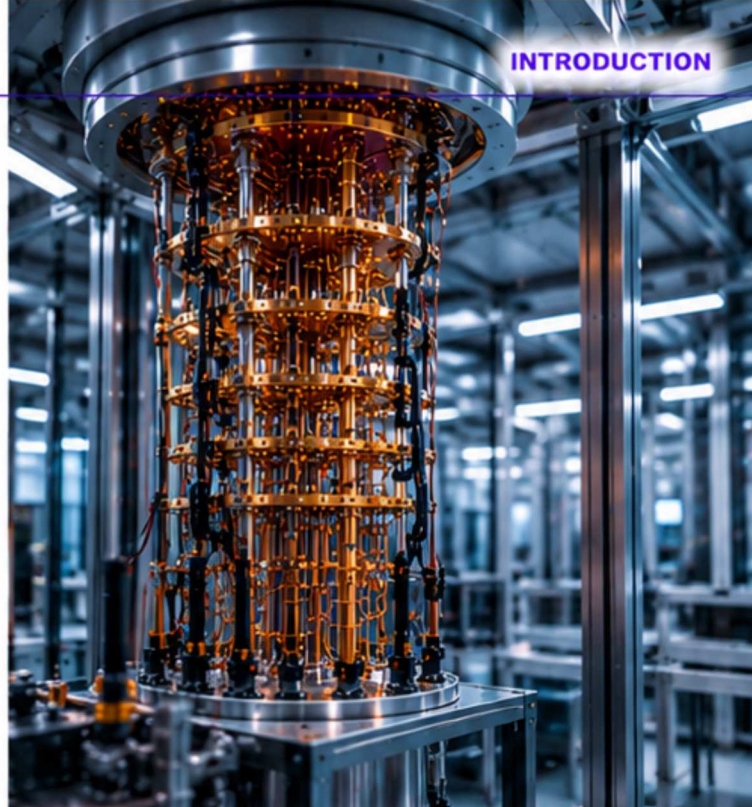
sps

Hall 6
Booth 428



FROM PROGRESS TO PRACTICAL IMPACT.

Quantum computing is moving from research labs to real-world systems, with growing investment, expanding supply chains and increasing signs of commercial deployment. This report brings together the latest evidence to assess where the industry stands, how it is evolving and what to watch in 2027.



WHY THIS REPORT

After more than a decade of rapid technical progress, quantum computing is entering a new phase. The focus is shifting from single milestones, such as qubit counts, to system performance, real-world deployments and commercial value. At the same time, governments, industry and research organisations are investing in the infrastructure, supply chains and skills needed to support longer-term growth.

This report provides a concise, evidence-based analysis for technology providers and decision-makers, highlighting the key developments, opportunities and challenges shaping the quantum industry in 2026 and beyond.

THE SIX KEY THEMES

The report is structured around six interconnected themes.

01 HARDWARE REALITY



Technical progress, system performance and the transition from research to commercial products.

02 QUANTUM INFRASTRUCTURE



The facilities, cloud platforms and national programmes being built to support scalable systems.

03 GLOBAL SUPPLY CHAIN



An international ecosystem for materials, components and expertise, with growing interdependence.

04 INVESTMENT AND INDUSTRY



Funding, corporate strategies and the emergence of a commercial quantum industry.

05 FROM EXPERIMENT TO ADOPTION



Early deployments across industry, research and the public sector, with a focus on practical applications.

06 THE COMMERCIAL REALITY



Market potential, barriers to adoption and what will determine the pace of commercial growth.

KEY QUESTIONS ADDRESSED



WHERE ARE WE NOW?

What measurable progress has been made in hardware, infrastructure and deployments?



WHAT IS DRIVING GROWTH?

How are investment, supply chains and industry strategies shaping the market?



WHAT ARE THE OPPORTUNITIES?

Which use cases and sectors are showing the strongest early momentum?



WHAT ARE THE CHALLENGES?

What technical, economic and policy barriers could slow widespread adoption?



Quantum computing is increasingly behaving like an industry, with real products, infrastructure and international supply chains. Whether it has developed a sustainable commercial market is a different question — and one that remains open.

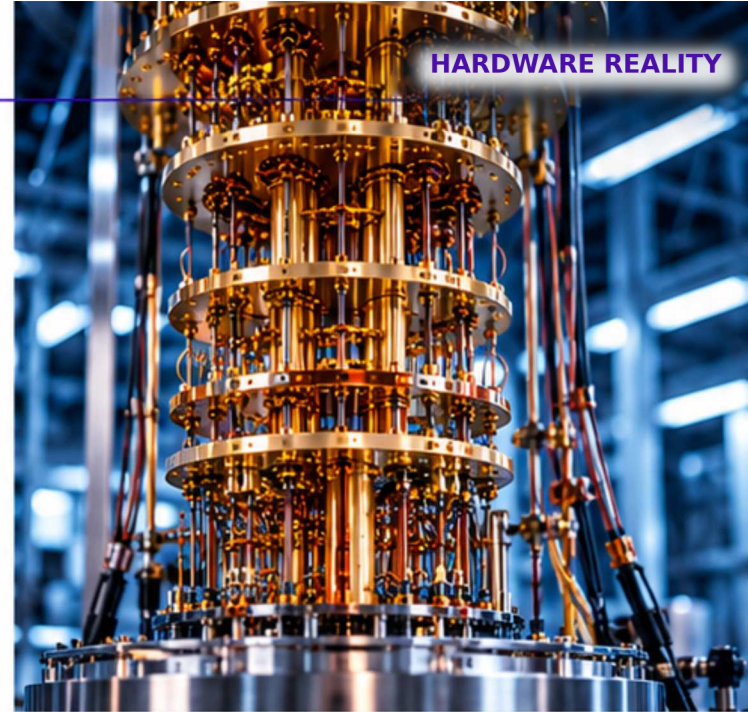
FROM LABORATORY TO PRODUCT.

Quantum computers are now being manufactured, delivered and supported as complete systems. Commercial availability marks an industrial milestone, but does not by itself demonstrate economic quantum advantage.

Commercial systems, real customers

Leading quantum hardware companies are now supplying systems to research institutions, national programmes and enterprise customers. These systems are being manufactured, installed and supported with service agreements, reflecting a shift from laboratory demonstrations to commercial products.

Access models include cloud platforms and on-premises deployments, giving organisations different options depending on their use cases, security requirements and integration plans.



Different machines, different purposes

Quantum computers use different architectures, which are designed for different types of problems. Gate-based systems, such as those from IBM and IQM, are aimed at a wide range of applications, from research to future fault-tolerant computing. Quantum annealing systems, such as D-Wave's, are designed for optimisation problems and offer a different approach to achieving practical value.

Qubit counts, connectivity and performance metrics are not directly comparable across architectures. Each system represents a different path towards real-world applications.

IBM
HERON

Gate-based superconducting


156 qubits

(Heron r2/r3)


Access

 IBM Quantum cloud;
selected on-premises systems

Focus

 Research and hybrid
computing

IQM
RADIANCE

Gate-based superconducting


20, 54 or 150

qubit configurations


Access

On-premises


Focus

HPC centres and research

D:wave
ADVANTAGE2

Quantum annealing


4,400+ qubits

20-way Zephyr connectivity


Access

 Leap cloud and on-premises
offerings

Focus

Optimisation

FROM PROTOTYPE TO PRODUCT

The path from research to commercial systems involves multiple stages.


RESEARCH

Scientific breakthroughs
and experimental systems
in research labs.


MANUFACTURE

Industrial production
of processors and
supporting infrastructure.


DELIVERY

Installation and integration
at customer sites or via
cloud platforms.


SUPPORT

Ongoing software updates,
maintenance and customer
engagement.



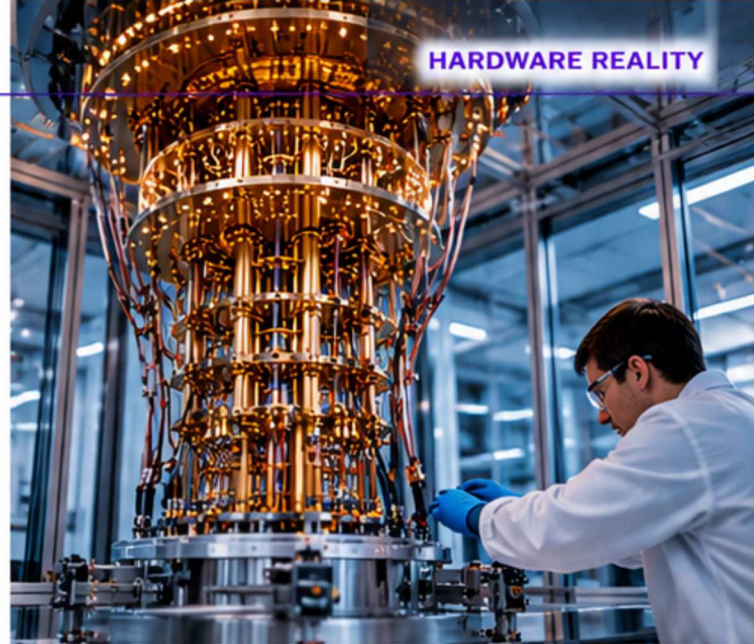
**A SYSTEM
YOU CAN BUY
IS NOT YET PROOF
OF A COMMERCIAL
ADVANTAGE.**

COMMERCIAL SYSTEMS ARE ARRIVING.

Quantum computers are moving beyond the laboratory. Leading manufacturers are now selling, delivering and installing systems for research institutions, national programmes and enterprise customers.

From development to deployment

In 2026, quantum hardware companies reported increasing orders, deliveries and installations. These systems are being used for research, algorithm development and early industrial applications, marking a shift from prototypes to commercial products.



Growing customer base

Customers include national research centres, supercomputing facilities and commercial organisations exploring real-world use cases. While the number of deployments is still modest, the trend shows a clear increase in activity and a widening range of users, from academic institutions to government programmes and early enterprise adopters.

IQM Commercial superconducting systems



26
systems sold
Total orders to
30 June 2026.



17
systems delivered
Installed at customer
sites to 30 June 2026.



Customers
Research institutions,
national programmes
and enterprise
organisations.

PASQAL Commercial neutral-atom systems



10
quantum processing
units (QPUs)
Total reported to
30 June 2026.



7
installed systems
Deployed at customer
sites to 30 June 2026.



3
in production
Additional systems
in final assembly
and test.

EuroHPC National and European programmes



6
quantum computer
procurements
Under the EuroHPC
Joint Undertaking.

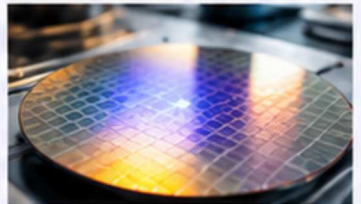


Multiple suppliers
Contracts include
systems from D-Wave,
IQM, Pasqal and QuEra.



Purpose
Build European quantum
infrastructure and
support user access
across Europe.

XANADU Manufacturing and supply chain development



Manufacturing partnership
Collaboration with
GlobalFoundries to
develop photonic
quantum chips.



Production readiness
Focus on scalable
manufacturing processes
and supply chain
development.



Strategic impact
Supports long-term
hardware supply and
industry-scale production
capability.

KEY TAKEAWAYS



SYSTEMS ARE BEING DELIVERED

Major manufacturers are selling and installing quantum computers for real customers.



PUBLIC INVESTMENT IS ACCELERATING

National and European programmes are expanding access through procurement and infrastructure development.



COMMERCIAL DEMAND IS STILL EMERGING

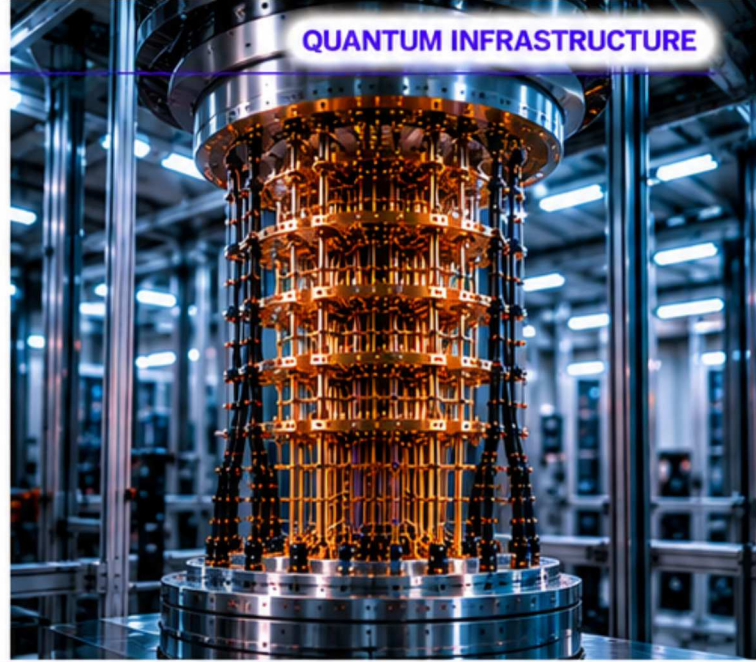
Deliveries reflect growing interest, but repeat customer demand and revenue at scale remain the key tests for long-term success.



Quantum hardware is now a deliverable product.
The next challenge is turning early deployments into sustained commercial demand.

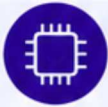
A GROWING INFRASTRUCTURE BASE.

Quantum computing is moving from research labs into broader infrastructure, with major technology companies expanding their facilities and cloud platforms, and governments procuring national systems. This growing infrastructure forms the foundation for future commercial applications, even as widespread market adoption remains some way off.



MAJOR PLAYERS EXPANDING CAPACITY

Leading technology companies and public initiatives are investing in quantum infrastructure, each taking different approaches to hardware development, cloud access and national capability.



IBM

Large-scale programme



IBM has announced a \$10 billion investment programme over five years to advance quantum computing, including the development of fault-tolerant systems, modular architectures and quantum memory. Its Poughkeepsie facility remains a key part of this effort, alongside a broader global research and engineering programme.



GOOGLE

Quantum hardware research



Google Quantum AI is developing superconducting quantum processors, error-correction techniques and the supporting systems needed for more capable quantum computing. Its work illustrates the continuing investment in specialist hardware and research infrastructure, rather than a confirmed new commercial facility.



MICROSOFT

Cloud-based access



Microsoft continues to expand its Azure Quantum platform, providing cloud access to a range of quantum hardware and software solutions. Its approach combines partnerships with hardware providers, its own development work and a focus on hybrid quantum-classical computing for real-world applications.



EUROHPC

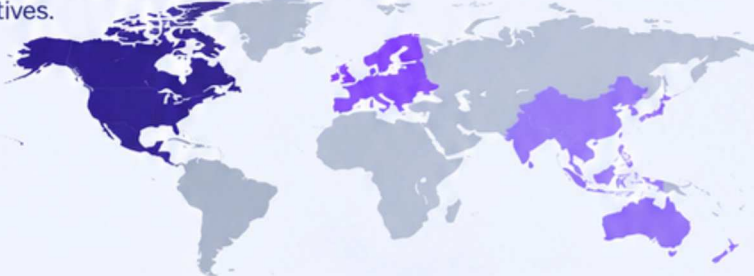
National quantum systems



The EuroHPC Joint Undertaking has procured six quantum computing systems across Europe to support research and innovation. These systems, being deployed in different member states, are intended to build a European quantum ecosystem and support development of applications in industry and the public sector.

A GLOBAL INFRASTRUCTURE FOOTPRINT

Quantum computing infrastructure is expanding across multiple regions, driven by a combination of commercial investment and government initiatives.



NORTH AMERICA

Major technology companies and government programmes are driving infrastructure expansion.

EUROPE

National systems and collaborative initiatives, including EuroHPC, are building regional capability.

ASIA-PACIFIC

Increasing investment and growing research infrastructure, particularly in China, Japan and Australia.

INFRASTRUCTURE IN NUMBERS

Key indicators illustrate the scale and pace of recent developments.



\$10 billion

IBM QUANTUM PROGRAMME

Five-year investment to advance fault-tolerant quantum computing.



6

EUROHPC SYSTEMS

Quantum computers procured across Europe to support research and innovation.



Multiple

CLOUD PROVIDERS

Quantum hardware accessible through major cloud platforms, including Azure Quantum.



Growing

NATIONAL INITIATIVES

New programmes and facilities announced in the US, Europe and Asia-Pacific.



Quantum infrastructure is expanding through dedicated facilities, publicly funded systems and cloud access. The next test is whether this capacity attracts sustained use.

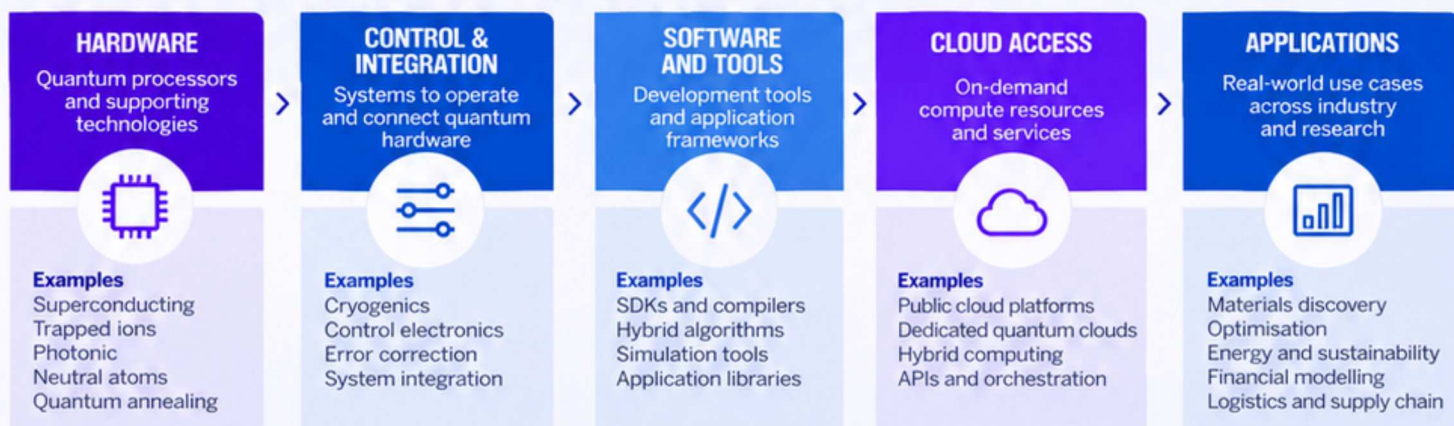
INTEGRATED. CONNECTED. READY FOR SCALE.

Quantum computing is becoming part of a broader computing ecosystem. Progress depends on integrating quantum processors with classical infrastructure, software tools, cloud platforms and skilled people. This integrated ecosystem will be essential to move from pilots and early deployments to wider commercial use.



THE QUANTUM COMPUTING ECOSYSTEM

From hardware to real-world applications, a connected stack is emerging.



CLASSICAL AND QUANTUM WORKING TOGETHER



Quantum systems are most effective when combined with high-performance classical computing, enabling hybrid workflows that use the right technology for each task.

CLOUD PLATFORMS ARE ACCELERATING ACCESS



Major cloud providers now offer quantum computing services, making it easier for organisations to experiment and develop applications without building their own infrastructure.

A GROWING ECOSYSTEM OF PARTNERS



Technology companies, research institutions and industry users are working together to develop hardware, software and applications, creating a more integrated and resilient ecosystem.

FROM PILOTS TO PRODUCTION ENVIRONMENTS



Early deployments are moving beyond research labs, with increasing use in industrial environments through cloud access and on-premises systems.

KEY INSIGHTS



AN INTEGRATED STACK
Hardware, software, cloud and applications are developing in parallel.



CLOUD IS A KEY ENABLER
Access through public and dedicated platforms is expanding rapidly.



PARTNERSHIPS MATTER
Collaboration across industry, research and the public sector is essential.



ECOSYSTEM MATURITY
A more connected ecosystem will be critical to wider commercial adoption.



Integration is turning quantum computing from a research technology into a practical tool for industry.

A GLOBAL SUPPLY CHAIN FROM THE START.

Quantum computing is an international industry from the outset. A new study of 160 companies across 15 headquarters countries shows a highly interconnected supply chain, with most organisations relying on international suppliers and serving customers in multiple countries.



KEY FINDINGS FROM THE GLOBAL QUANTUM SUPPLY CHAIN STUDY

Based on a survey of 160 quantum companies across 15 headquarters countries.



A WIDE INTERNATIONAL FOOTPRINT

Survey respondents work with suppliers and customers across all major regions, highlighting the global nature of the quantum industry.



ADDITIONAL INSIGHTS FROM THE STUDY

On average, quantum companies work with multiple countries as part of their supply chains and customer base.



WHAT THIS MEANS



Quantum computing is an international industry from the outset. Its future growth will depend on maintaining access to specialised suppliers, manufacturing capacity and customers across borders.

FROM SPECIALIST COMPONENTS TO COMPLETE SYSTEMS

A complex international supply chain underpins every quantum computer, with specialist materials, components and expertise sourced from many countries before being integrated into complete systems.

A multi-layered supply chain

Quantum systems rely on a wide range of highly specialised components. From cryogenic cooling and control electronics to photonics, precision manufacturing and advanced materials, no single country or company dominates the supply chain.

This distributed ecosystem brings innovation and resilience, but also creates dependencies. Delays, export controls or geopolitical tensions in one part of the chain can affect development timelines and commercial deployment.



From components to capability

Bringing a quantum computer to market requires the integration of multiple specialist technologies. Many of these components are sourced internationally, often from established industries such as semiconductors, photonics, vacuum systems and high-precision engineering.

Recent agreements, such as Xanadu's manufacturing partnership with GlobalFoundries, highlight the growing reliance on advanced semiconductor manufacturing capabilities to scale quantum systems.

THE QUANTUM SUPPLY CHAIN

From raw materials to complete systems, quantum computing depends on a global network of specialised suppliers, manufacturing partners and integration expertise.

MATERIALS AND SUBSTRATES

-  Ultra-pure materials (e.g. silicon, niobium)
-  Specialist substrates
-  Isotopes and chemical precursors

KEY COMPONENTS

-  Cryogenic systems
-  Control electronics
-  Photonics and lasers
-  Magnets and shielding
-  Vacuum systems
-  Precision engineering

MANUFACTURING AND FABRICATION

-  Semiconductor fabrication
-  Precision machining
-  Specialist assembly
-  Integration and test

SYSTEM INTEGRATION

-  Cryostat integration
-  Control systems
-  Software and firmware
-  System validation

DEPLOYMENT AND USE



Complete quantum systems for research, industry and government

KEY INSIGHTS



GLOBAL DEPENDENCE

No single country can supply all the materials, components and expertise needed for quantum systems.



CROSS-INDUSTRY LINKS

Quantum relies on established industries, including semiconductors, photonics, vacuum and precision engineering.



MANUFACTURING PARTNERSHIPS

Deals such as Xanadu's agreement with GlobalFoundries show the growing role of advanced semiconductor manufacturing.



RESILIENCE IS CRITICAL

As the industry scales, supply-chain resilience, export controls and access to specialist components will become increasingly important.

SIGNIFICANT CAPITAL. A LONGER JOURNEY.

Investment is building quantum industrial capacity. Commercial revenues remain modest, and the next test is repeat customer demand and measurable economic value.



\$12.7bn

**NEW GOVERNMENT
FUNDING COMMITMENTS
(2025)**

Governments worldwide announced \$12.7 billion in new commitments for quantum technologies in 2025, a 310% increase on 2024.



\$4.9bn

**PRIVATE VENTURE
CAPITAL (2025)**

Private investors committed \$4.9 billion to quantum technology companies in 2025, a 192% increase on 2024.



\$1.9bn

**GLOBAL QUANTUM
COMPUTING AND
SENSING MARKET (2025)**

The global market for quantum computing and sensing is estimated at \$1.9 billion in 2025, with quantum computing accounting for the larger share.



\$56.7bn

**CUMULATIVE ANNOUNCED
GOVERNMENT COMMITMENTS
(END-2025)**

Total announced government funding commitments reached \$56.7 billion by the end of 2025. These commitments are not equivalent to actual expenditure.

GOVERNMENT COMMITMENTS STRONG GROWTH IN 2025



New government funding commitments for quantum technologies increased by 310% in 2025 compared with 2024, reaching \$12.7 billion.

PRIVATE VENTURE CAPITAL INVESTOR INTEREST ACCELERATES



Private venture capital investment in quantum technology companies increased by 192% in 2025 compared with 2024, reaching \$4.9 billion.

GLOBAL QUANTUM TECHNOLOGY MARKET (2025)

COMPUTING AND SENSING



Source: QED-C, State of the Global Quantum Industry 2026 (April 2026).

KEY INSIGHTS



POLICY SUPPORT

Governments are increasing funding commitments to build national capabilities, support research and create the infrastructure needed for future commercialisation.



INVESTOR CONFIDENCE

Private investment is growing rapidly, reflecting confidence in the long-term potential of quantum technologies, despite the current limited revenue base.



MARKET CONVERSION

The overall market remains small relative to investment levels. The next phase will depend on moving from pilots to repeat customer adoption and measurable economic value.



Capital is building industrial capacity.
Repeat customer spending will determine commercial maturity.

FROM COMMITMENTS TO COMMERCIAL IMPACT.

Quantum manufacturers are winning orders and delivering systems, but recognised revenue remains modest relative to the capital required to scale. Two European hardware companies illustrate the gap between industrial momentum and commercial maturity.



IQM

SUPERCONDUCTING
QUANTUM COMPUTERS

Finnish quantum hardware company delivering superconducting systems for research and high-performance computing.



REVENUE
(H1 2026)

€8.9m



OPERATING LOSS
(H1 2026)

€60.5m



ORDER BACKLOG

€69.1m

at 30 June 2026

€102.1m

at 3 August 2026



PASQAL

NEUTRAL ATOMS
QUANTUM COMPUTERS

French quantum hardware company developing neutral-atom systems for enterprise, research and industrial applications.



REVENUE
(H1 2026)

€4.9m



OPERATING LOSS
(H1 2026)

€59.2m



BOOKED AND
AWARDED BUSINESS

€70.4m

at 30 June 2026
Includes grants, tax credits
and multi-year customer
contracts.

Operating loss includes €37.5m share-based payments and one-time listing charges.

THE COMMERCIAL CONVERSION PATHWAY

From initial orders to sustainable business growth.



ORDERS / AWARDS

Systems and projects won from research institutions, enterprises and governments.



DELIVERY

Systems are built, installed and integrated with customer environments.



RECOGNISED REVENUE

Revenue is recorded as systems and services are delivered, typically over multiple periods.



REPEAT CUSTOMERS

Long-term commercial success depends on repeat demand and follow-on orders.

Illustrative commercial pathway

KEY INSIGHTS



ORDERS ARE NOT REVENUE

Large order backlogs and booked business show strong interest, but they do not translate immediately into recognised revenue.



GROWTH STILL REQUIRES CAPITAL

Both companies are investing heavily to scale their technology, with significant operating losses in 2026.



REPEAT DEMAND IS THE REAL TEST

The long-term commercial success of quantum hardware will depend on repeat customer demand and the expansion from initial deployments to wider use.



**INDUSTRIAL CAPACITY IS GROWING.
SUSTAINABLE CUSTOMER DEMAND STILL HAS TO FOLLOW.**

FROM EXPERIMENT TO ADOPTION.

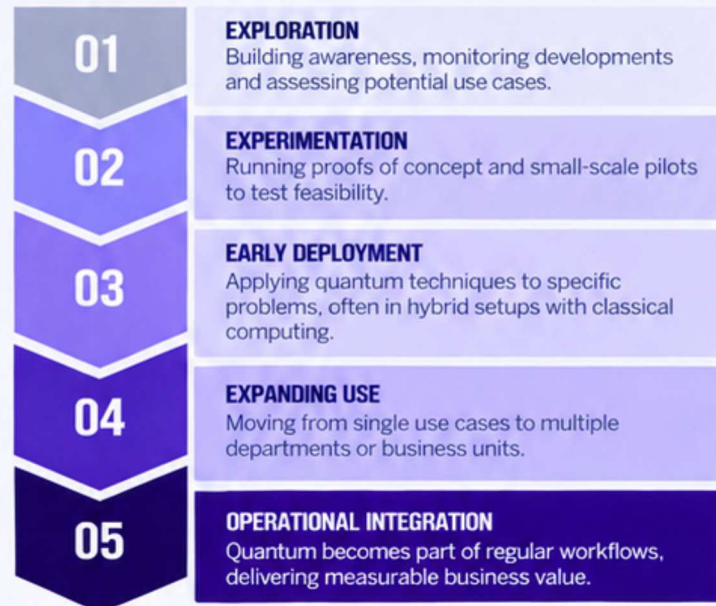
Quantum computing is moving beyond research labs, with a growing number of organisations testing and deploying real-world applications. Most current use cases focus on specific, high-value problems where quantum techniques can deliver measurable benefits, often alongside classical computing in hybrid approaches.



FROM EXPERIMENT TO ADOPTION

THE ADOPTION PATHWAY

Organisations typically move through a staged journey from exploration to operational deployment.



CASE STUDY

Energy forecasting with Schneider Electric and Silicon Quantum Computing

Schneider Electric and Silicon Quantum Computing tested quantum approaches to next-day household energy forecasting. The project reported an average 20% accuracy improvement against its classical benchmark, with gains up to 41% in selected cases.

+20%

Average improvement in forecasting accuracy (company-reported).

Up to +41%

Peak improvement in selected cases (company-reported).



THE CHALLENGE

Accurate next-day forecasts help plan household demand and manage the electricity grid.



THE APPROACH

Hybrid quantum-classical models to analyse complex energy usage patterns and external variables.



THE IMPACT

Reported gains justify further study. Cost savings and emissions reductions remain unproven.

SELECTED APPLICATION AREAS

Early deployments are emerging across a range of sectors.



LIFE SCIENCES

Molecular modelling and drug discovery



MATERIALS

New materials and chemistry simulation



LOGISTICS

Route planning and supply chain optimisation



ENERGY

Grid optimisation and energy forecasting



FINANCIAL SERVICES

Risk modelling and portfolio optimisation

WHAT SEPARATES PILOTS FROM PRODUCTION?

Moving from early success to wider adoption requires more than technical feasibility.



VALIDATED PERFORMANCE

Consistent results across different datasets and real-world environments.



INTEGRATION WITH EXISTING SYSTEMS

Compatibility with current IT infrastructure and workflows.



MEASURABLE ECONOMICS

Clear cost-benefit case, including operational efficiency and business value.



REPEATABILITY AT SCALE

Proven results across multiple use cases, departments or locations.

KEY INSIGHTS



REAL-WORLD USE CASES

The number of practical deployments is increasing, particularly in specific, high-value areas.



FOCUS ON MEASURABLE OUTCOMES

Early adopters are reporting tangible improvements, such as optimisation, forecasting and simulation.



HYBRID APPROACHES

Most current deployments combine quantum and classical computing to deliver practical results.



COMMERCIAL MOMENTUM IS BUILDING

As more use cases demonstrate value, adoption is expected to accelerate in the coming years.

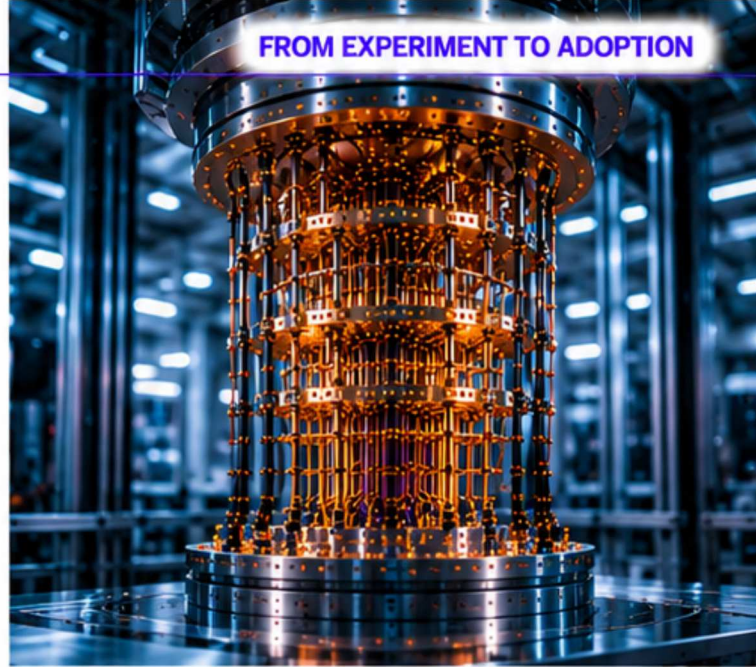


Early applications are beginning to demonstrate measurable benefits.

The commercial test is whether these results can be reproduced, integrated and scaled.

FROM PILOTS TO PRACTICAL APPLICATIONS.

Quantum computing is moving beyond laboratory demonstrations, with a growing number of pilots and early deployments in industry and the public sector. Applications are emerging where quantum systems can address complex optimisation, simulation and modelling problems, often in combination with classical computing and AI. These early use cases are building experience, capability and confidence for broader adoption.



SELECTED EARLY APPLICATIONS

Organisations are exploring quantum computing in a range of real-world scenarios, from industrial optimisation to materials discovery and financial modelling.



CHEMISTRY & MATERIALS

Simulation and discovery



Pharmaceutical and chemical companies are using quantum computing to simulate complex molecules and materials, with the aim of accelerating the discovery and development of new catalysts, batteries and pharmaceuticals.



LOGISTICS & MANUFACTURING

Optimisation and planning



Industrial companies are testing quantum algorithms for route planning, production scheduling and supply chain optimisation. These pilots aim to improve efficiency, reduce costs and increase resilience in complex, global supply networks.



FINANCIAL SERVICES

Risk and modelling



Banks and financial institutions are exploring quantum computing for portfolio optimisation, risk modelling and fraud detection. Early use cases focus on improving the speed and accuracy of complex calculations, with the potential to enhance decision-making in volatile markets.



MOBILITY & TRANSPORT

Scheduling and operations



Transport organisations are exploring quantum computing for traffic optimisation, network planning and fleet management. These pilots aim to improve operational efficiency and resource allocation in complex and dynamic environments.

INDUSTRY ENGAGEMENT IS GROWING

Survey of 107 senior practitioners worldwide (June 2026).

IQM / The Quantum Insider State of Quantum 2026

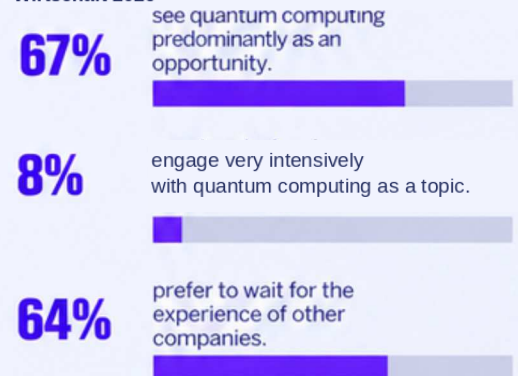


GERMANY: OPPORTUNITY RECOGNISED, CAUTIOUS APPROACH

Survey of 607 German companies with at least 100 employees (late 2025).

Bitkom

Quantencomputing in der deutschen Wirtschaft 2026



KEY INSIGHTS



EARLY EXPLORATION

Pilots and early deployments are demonstrating practical value in specific use cases.



GROWING ENGAGEMENT

A high proportion of organisations are now exploring or working with quantum computing.



CAUTIOUS ADOPTION

Scaled operational use remains limited, with many organisations preferring to wait for further evidence and experience.



FOCUS ON VALUE

The next phase will depend on moving from pilots to scalable deployments that deliver measurable economic value.



Early applications are building experience and confidence.

The challenge now is to move from pilots to scalable, value-generating deployments.

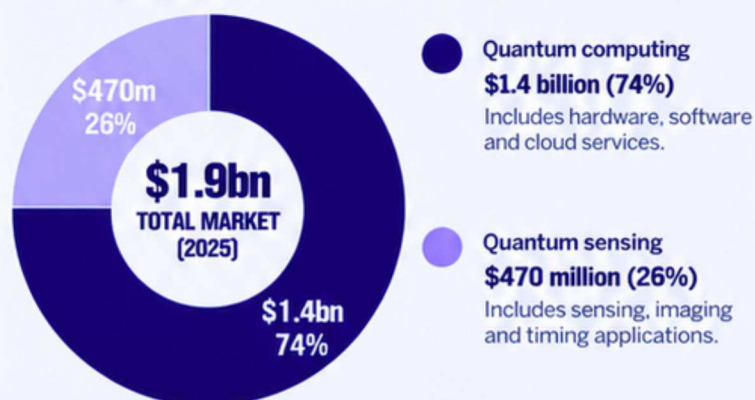
Sources: IQM / The Quantum Insider, State of Quantum 2026 (June 2026), Bitkom, Quantencomputing in der deutschen Wirtschaft 2026 (March 2026).

THE COMMERCIAL REALITY CHECK.

The quantum industry has moved beyond the laboratory and is building the foundations for future markets. Investment, talent and industrial engagement are all increasing. Yet commercial revenues remain relatively modest, reflecting an industry that is still in early stages, with most organisations in pilot or exploratory phases. The next phase will depend on turning technical progress and early use cases into sustained customer adoption and measurable economic value.

GLOBAL QUANTUM TECHNOLOGY MARKET (2025)

The global market for quantum computing and sensing is estimated at \$1.9 billion in 2025, with quantum computing accounting for the larger share.



Source: QED-C, State of the Global Quantum Industry 2026, April 2026.

A GLOBAL AND DIVERSE SUPPLY CHAIN

An analysis of 160 quantum-related companies in 15 countries shows a highly international supply chain, with 90% using at least one foreign supplier and 74% having foreign customers.



use at least one foreign supplier.



have foreign customers.



countries analysed

AN INTERNATIONAL SUPPLY NETWORK

36 supplier countries

Specialist components cross borders.

25 manufacturing countries

Production capability spans many regions.

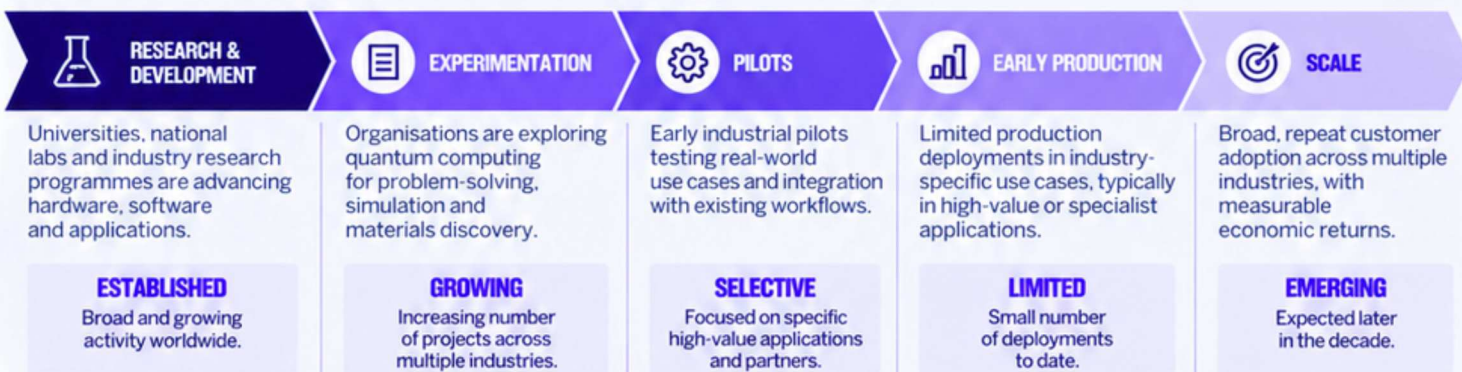
49 customer countries

Demand is geographically distributed.

Source: QED-C, Global Quantum Supply Chain Study (2026).

COMMERCIAL MATURITY: WHERE THE MARKET STANDS

Quantum computing is progressing through a range of deployment stages, with activity concentrated in research, pilots and early production. Widespread commercial adoption is expected later in the decade.



KEY INSIGHTS



MARKET REMAINS MODEST

At \$1.9 billion in 2025, current revenues are small but indicate early commercial activity.



INVESTMENT IS BUILDING CAPACITY

Government commitments and private investment are providing the resources needed to grow the industry.



A GLOBAL ECOSYSTEM

The supply chain spans multiple countries, with high levels of international collaboration and dependence.



COMMERCIAL GROWTH WILL TAKE TIME

The next phase will depend on moving from pilots to repeat customer adoption, with measurable economic value.



The commercial quantum market is still in its early stages. Sustained investment and growing real-world use will determine its future scale.

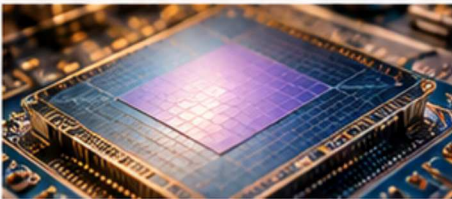


WHAT TO WATCH IN 2027.

Quantum computing is entering a new phase in 2027. The focus shifts from technical milestones to commercial execution, as companies work to scale systems, expand deployments and demonstrate real-world value. A number of key developments will indicate how quickly the industry can move from early adoption to sustainable growth.



01 SCALING SYSTEMS



Larger and more capable systems, with a focus on error correction and logical qubits.



Continued improvements in performance, stability and user accessibility.



Evidence of systems moving from research to production environments.

02 GROWING DEPLOYMENTS



More customer deployments across industry, research and the public sector.



Expansion of access through cloud platforms and national programmes such as EuroHPC.



Greater transparency on repeat usage and longer-term contracts.

03 INDUSTRY APPLICATIONS



Progress in high-value use cases including materials, chemistry, logistics and energy.



Clearer evidence of quantum advantage for specific, practical problems.



Early commercial services emerging from pilots and partner programmes.

04 ECOSYSTEM AND SUPPLY CHAIN



Expansion of component supply chains across multiple regions.



Growth in specialised suppliers for cryogenics, control systems, photonics and software.



Increased international collaboration and investment in manufacturing capacity.

05 POLICY AND STANDARDS



Continued public investment through national and European programmes.



Progress on standards, interoperability and benchmarking frameworks.



Closer alignment between quantum, cybersecurity and industrial policy.

06 INVESTMENT AND MARKET DEVELOPMENT



Sustained investment in hardware, software and supporting infrastructure.



Greater focus on revenue conversion and unit economics.



Early signs of market consolidation as commercial leadership emerges.

KEY TAKEAWAYS



FROM MILESTONES TO EXECUTION

The focus in 2027 will be on deployments, revenue and demonstrable value.



WIDER ECOSYSTEM PARTICIPATION

Growth depends on a resilient global supply chain and continued collaboration.



REAL-WORLD IMPACT REMAINS KEY

Commercial success will be measured by practical applications and repeat customer demand.



A FOUNDATIONS YEAR FOR SCALE

2027 will set the pace for broader adoption in the years that follow.



2027 will be a defining year for quantum computing.

The challenge is to turn growing momentum into commercially sustainable growth.

K R O W N E

IDEAS.
INSIGHT.
INFLUENCE.
IMPACT.

EVERYONE CAN NOW WRITE. BUT WHO – OR WHAT – IS READING?

AI is changing how organisations are discovered, understood and represented. Krowne helps companies define the narrative they want to own, measure the gap between intention and perception, and engineer the content and signals needed to close it.

STRATEGIC NARRATIVE ENGINEERING FROM CONTENT PRODUCTION TO MARKET POSITION



DEFINE

Clarify the narrative you want to own.



MEASURE

Identify the gap between intention and perception.



ENGINEER

Create and reinforce the right content and signals.



ACHIEVE

Stronger visibility, influence and commercial impact.



NARRATIVE GAP ANALYSIS

TURN INSIGHT INTO ACTION

A structured assessment of how your organisation is seen today, and what is needed to close the gap.



Discover
Strategic Narrative
Engineering

krowne.tv/who-are-we/

K R O W N E

CONTENT IS KING.
NARRATIVE BUILDS THE KINGDOM.