2026 QUANTUM READINESS SURVEY

Executive Research Report – Part 1

**Global Perspectives on Quantum Computing Adoption,
Technology Preferences, and Organizational Readiness**

January 2026

291 respondents • 25+ countries
Academia • Industry • Government • Vendors

Prepared by

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Putting Quantum to Work

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Executive Summary

The 2026 Quantum Readiness Survey captures perspectives from 291 quantum computing stakeholders across 25+ countries, representing academia, industry, government, and technology providers. This report provides actionable intelligence on adoption trajectories, technology preferences, organizational preparedness, and regional variations in quantum readiness.

The report is being released as a three-part analytical series, reflecting the breadth of insights contained in the data and the market's transition from early enthusiasm to disciplined evaluation. Rather than presenting all findings at once, the report is structured to surface distinct dimensions of quantum readiness in a logical sequence.

Part 1 (this document) focuses on the market reality check: how confidence, preparedness, and demand signals are evolving as organizations move from belief in quantum computing's potential to benchmarking its readiness against real-world constraints. It examines shifts in sentiment, organizational maturity, and regional variation, establishing a baseline for understanding where the market stands today.

Subsequent sections explore how this baseline translates into **investment and procurement behavior (Part 2)** and **technology, talent, and roadmap expectations (Part 3)**.

The state of quantum computing in early 2026 is defined by a convergence of technical validation and a recalibration of expectations. Over the past year, the industry has largely moved beyond fundamental questions about hardware feasibility. Multiple platforms have demonstrated scalable operation, reinforcing confidence that the underlying physics works. As a result, the focus has shifted from belief in quantum computing's potential to a more grounded assessment of readiness, applicability, and execution.

This shift is reflected in how organizations assess both national positioning and their own preparedness. Compared to prior years, confidence has moderated and self-assessments have become more cautious. This moderation should not be interpreted as declining belief in quantum computing's importance. Instead, it reflects a rising bar for what it means to be "quantum-ready" as organizations confront real-world constraints, integration challenges, and the gap between experimental demonstrations and deployable capability.

At the same time, demand-side signals are strengthening where quantum computing is economically grounded. Many organizations now report concrete limitations in their classical computing environments, particularly for simulation-heavy workloads. For these respondents, quantum computing is no longer viewed primarily as a speculative future technology, but as a potential response to problems they already face today.

Year-over-Year Context

Compared to the 2025 Quantum Readiness Survey (n=770), several metrics show notable shifts:

- **National confidence has moderated:** "Very well positioned" responses dropped from 45%+ to 25%, suggesting post-hype recalibration as organizations confront implementation realities.
- **Preparedness has declined:** 55% now report being prepared vs. 65%+ in 2024—the bar for "quantum-ready" has risen as fault tolerance becomes the standard.
- **Modality preferences remain stable:** Neutral atoms maintain their lead among those with preferences, though 34% now say "too early to determine."
- **Challenge hierarchy unchanged:** Technology maturity, cost, and unclear ROI remain the top three barriers, with workforce concerns rising in prominence.

Together, these shifts indicate a market that is becoming more realistic and more selective, rather than less engaged.

Key Findings

- **The Classical Wall as Catalyst:** 62% of respondents with applicable workloads report moderate to critical classical computing limitations. Adoption momentum is concentrated in sectors hitting computational walls—simulation for materials, chemistry, and drug discovery (42% of use cases) represents the clearest path to quantum advantage.
- **Timeline Expectations Compressing**: 43% expect quantum superiority within 5 years; 37% within 6-10 years. Only 17% anticipate timelines beyond 10 years—and less than 1% say "never."
- **Organizational Maturity in Transition**: 56% are actively engaged (exploring, PoC, or evaluation phases); only 13% have reached production deployment. The 12% with no initiatives represents a shrinking but persistent segment.
- **Preparedness Reflects Rising Standards:** Fewer organizations describe themselves as fully prepared, not because progress has stalled, but because expectations around readiness have increased as understanding deepens.
- **Talent as the Binding Constraint**: 37% cite workforce availability as a primary barrier—the fourth-highest challenge overall. Innovation speed may now be capped by talent pipelines, not capital. [EXTERNAL CONTEXT: Industry estimates suggest a 3:1 ratio of open quantum positions to qualified candidates, with the QEC talent pool numbering fewer than 2,500 specialists globally.]

These findings collectively reinforce that the market is moving from experimentation toward evaluation, with greater emphasis on realism and applicability.

Regional Highlights

- **United States (n=95):** Respondents report the highest confidence in national positioning and global leadership. Organizational engagement levels are relatively strong, reflecting a mature ecosystem.
- **European Union (n=82):** Respondents express a more cautious outlook on national positioning and readiness, consistent with a more measured adoption posture.

- **Japan (n=22):** Timeline expectations tend to be conservative, with comparatively low levels of reported organizational preparedness despite sustained engagement.
- **India (n=9):** Respondents report the most optimistic timeline expectations, reflecting a forward-looking posture among a smaller but highly engaged cohort.

Regional variation underscores that quantum readiness is shaped as much by ecosystem context as by technology itself.

Strategic Implications

The year 2026 is not the year quantum computing becomes ubiquitous. It is the year quantum computing becomes inevitable. The organizations that treat it as a decade-away science project will find themselves on the wrong side of the exponential curve when technical progress translates into commercial advantage.

- **The market is maturing:** Cooling confidence and declining self-assessed preparedness reflect rising standards for readiness, not declining belief in quantum computing's importance.
- **Readiness is uneven and contextual:** Smaller, more agile organizations often report higher preparedness than larger enterprises, highlighting structural and integration challenges rather than lack of intent.
- **Talent constraints are emerging as a limiting factor:** Workforce availability is increasingly cited as a barrier, suggesting that execution capacity, not just technology progress, will shape adoption timelines.
- **Regional context matters:** Significant variation in confidence and readiness across geographies indicates that ecosystem structure and national context strongly influence how organizations assess their position.

Methodology

The 2026 Quantum Readiness Survey was conducted online and collected 291 complete responses. The survey instrument comprised 25 substantive questions (Q1-Q25) covering demographics, perceptions, organizational readiness, technology preferences, and market outlook. Two additional questions (Q26-Q27) collected contact information and were excluded from analysis for privacy protection.

Sample Composition

The sample represents a technically sophisticated audience with deep quantum computing engagement:

- Academic researchers/professors: 42%
- Quantum computing/technology company employees: 16%
- End-user companies evaluating quantum: 12%
- Enthusiasts and self-learners: 12%
- Analysts, consultants, press: 7%
- Government/public sector: 7%

Geographic Distribution

Respondents represent 25+ countries, with concentration in:

- United States: 33% (n=95)
- European Union: 28% (n=82)
- Japan: 8% (n=22)
- United Kingdom: 6% (n=17)
- Other (Canada, India, Israel, South Korea, etc.): 25%

Analytical Approach

All analyses employed appropriate statistical methods: chi-square tests for categorical associations, Spearman correlations for ordinal relationships, and Benjamini-Hochberg FDR correction for multiple comparisons. Multi-select questions were analyzed using binary indicators for each response option.

Year-over-Year Comparability

This report includes selective comparisons to the 2025 Quantum Readiness Survey (n=770, December 2024). Methodological differences limit direct comparison. Trend interpretations should be considered directional rather than precise measurements.

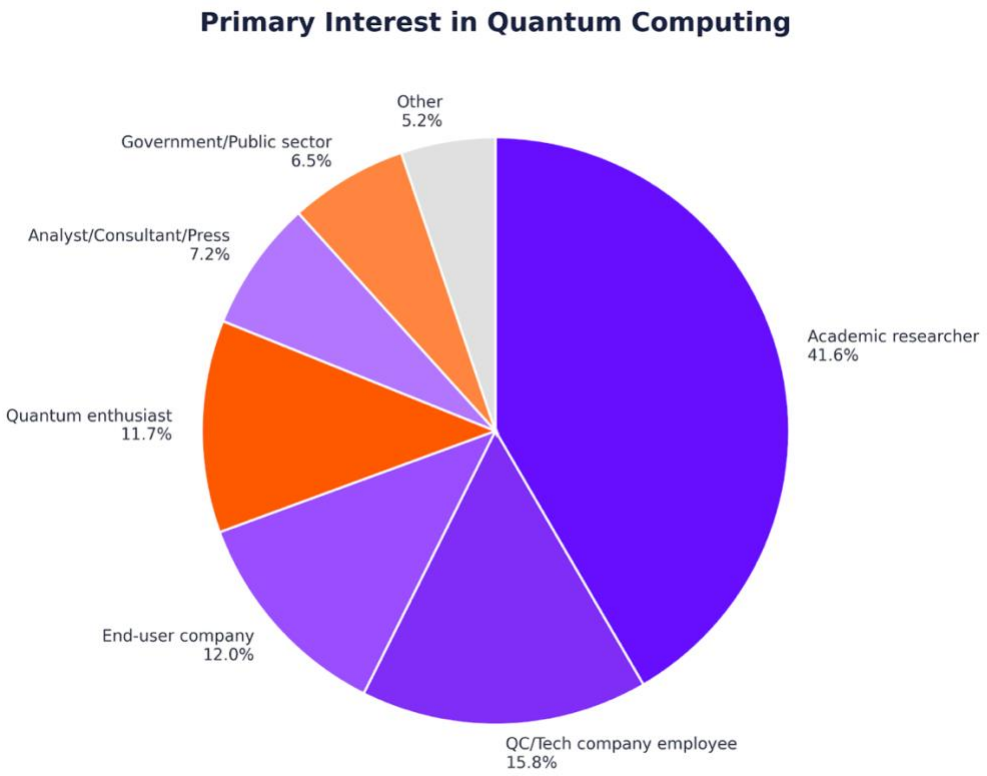
Detailed Findings

Section 1: Respondent Demographics

Q1: Primary Interest in Quantum Computing

Response	Count	Percentage
Academic researcher or professor	121	41.6%
QC/technology company employee	46	15.8%
Company using/evaluating QC	35	12.0%
Quantum enthusiast	34	11.7%
Analyst/consultant/press	21	7.2%
Government/public sector	19	6.5%
Other	15	5.2%

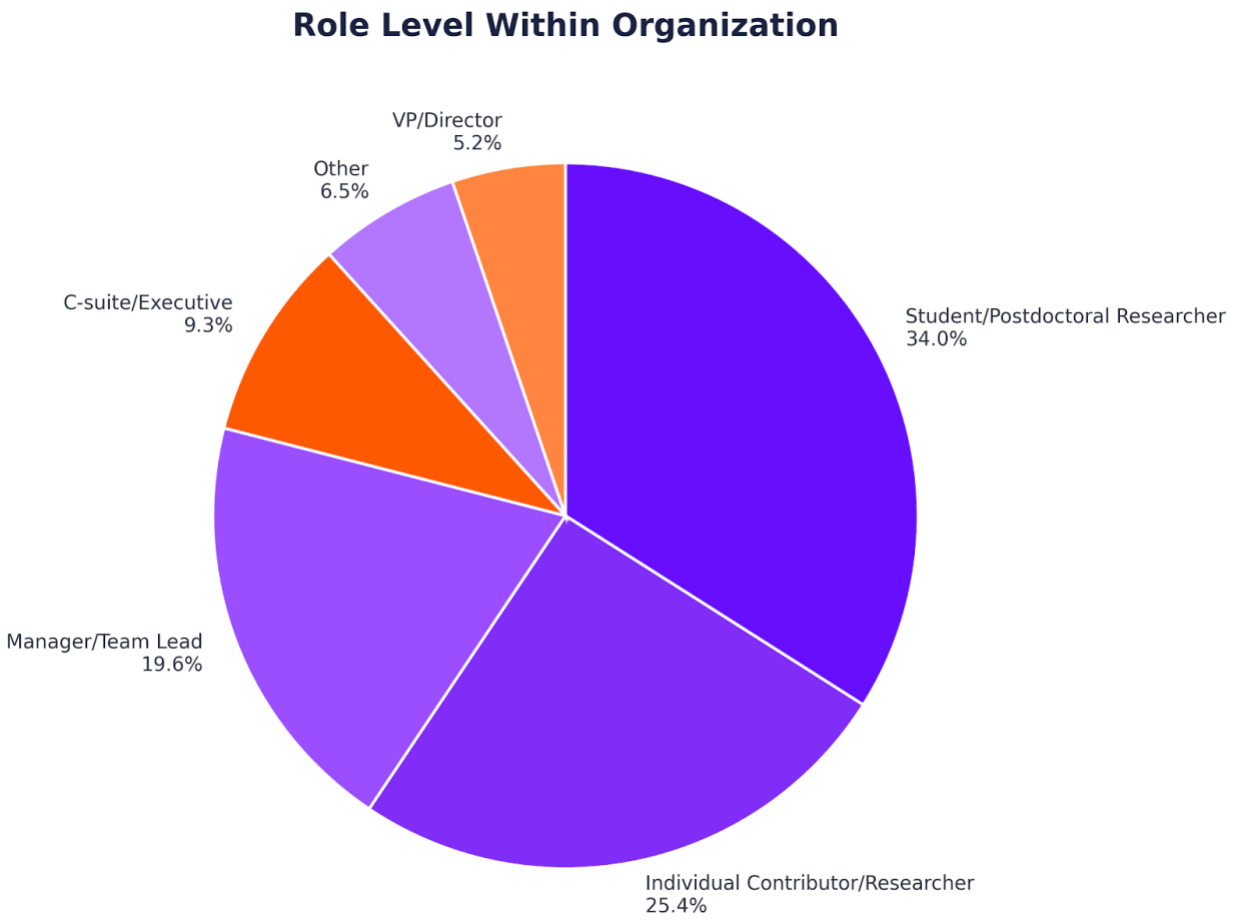
The sample skews academic (42%), reflecting the current state of quantum computing where research institutions remain primary drivers of talent and innovation. However, the combined industry presence (28% from QC companies + end-users) signals meaningful commercial engagement.



Q2: Role Level Within Your Organization

Response	Count	Percentage
Student/Postdoctoral Researcher	99	34.0%
Individual Contributor/Researcher	74	25.4%
Manager/Team Lead	57	19.6%
C-suite/Executive	27	9.3%
VP/Director	15	5.2%
Other	19	6.5%

Leadership representation (C-suite + VP/Director: 15%) provides strategic perspective, while the strong student/postdoc cohort (34%) offers emerging talent viewpoints.

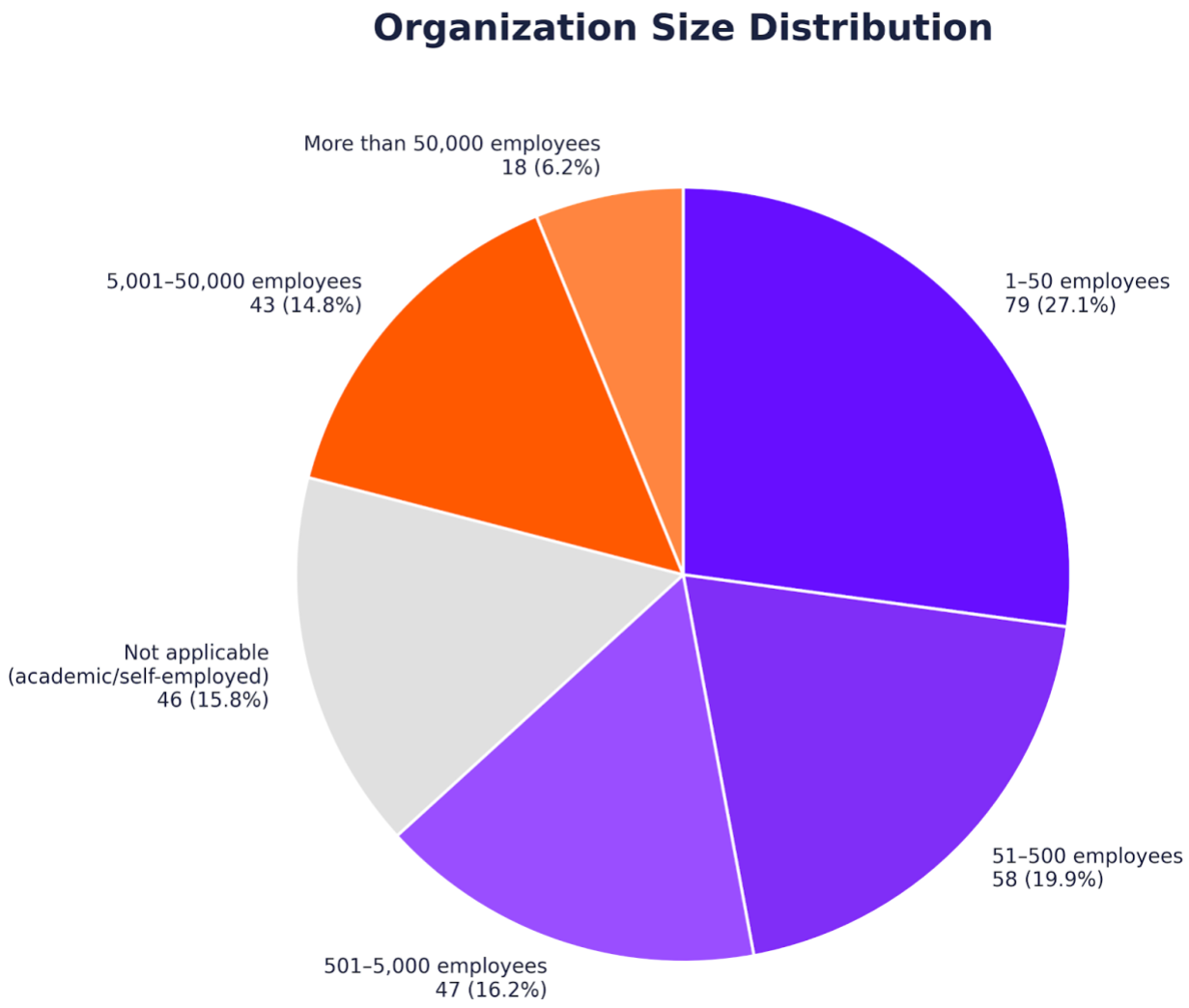


Q3: Approximate Organization Size

Organization Size	Count	Percentage

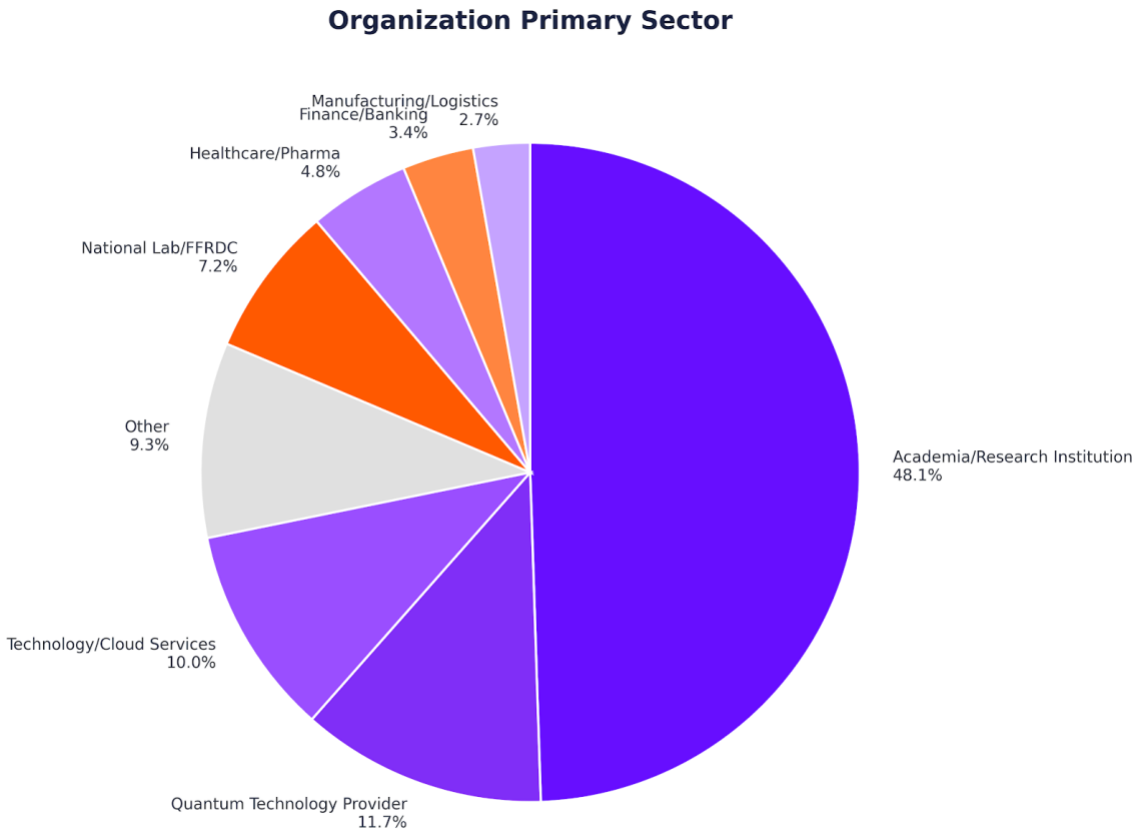
1–50 employees	79	27.1%
51–500 employees	58	19.9%
501–5,000 employees	47	16.2%
5,001–50,000 employees	43	14.8%
More than 50,000 employees	18	6.2%
Not applicable (academic/self-employed)	46	15.8%

n=291 respondents



Q4: Primary Sector

Sector	Count	Percentage
Academia/Research Institution	140	48.1%
Quantum Technology Provider	34	11.7%
Technology/Cloud Services	29	10.0%
National Laboratory/FFRDC	21	7.2%
Healthcare/Pharmaceuticals	14	4.8%
Finance/Banking/Insurance	10	3.4%
Manufacturing/Logistics	8	2.7%
Aerospace/Defense	6	2.1%
Other	29	10.0%

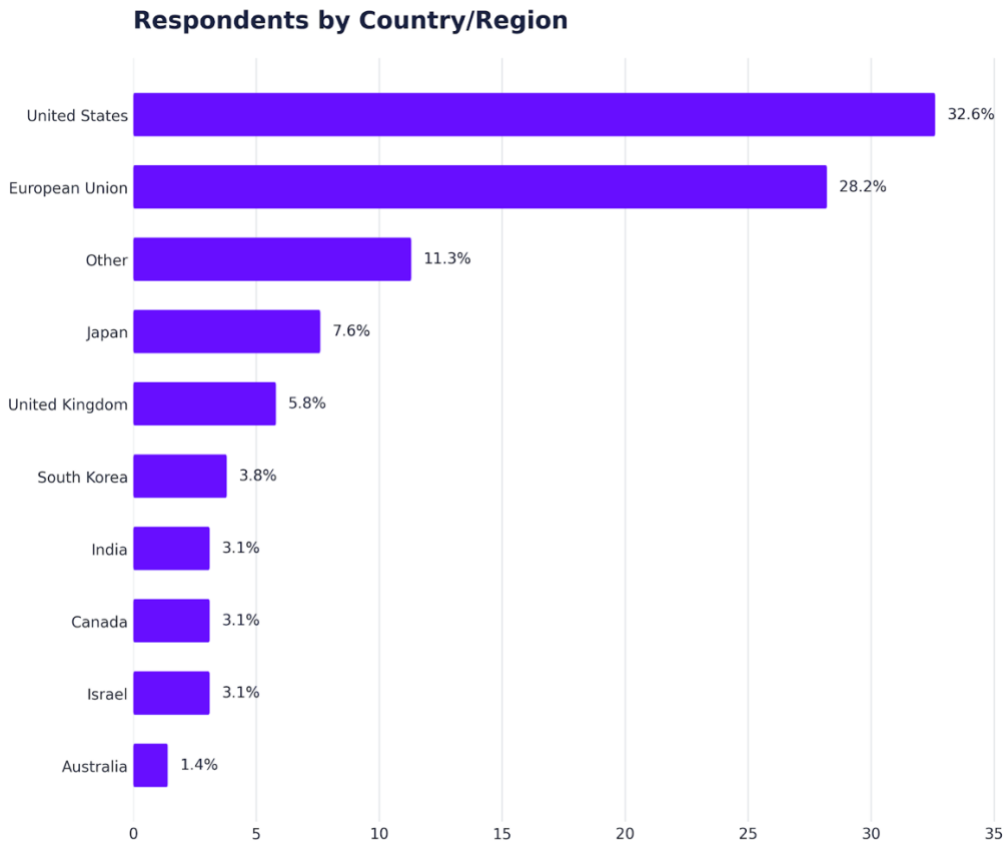


Q5: Country

Please select the primary country you work in

Sector	Count	Percentage
United States	95	32.6%
European Union	82	28.2%
Japan	22	7.6%
United Kingdom	17	5.8%
South Korea	11	3.8%
India	9	3.1%
Israel	9	3.1%
Canada	9	3.1%
Australia	4	1.4%
Other	33	11.3%

Geographic distribution spans 25+ countries with strong North American and European representation. The United States leads (33%), followed by the European Union (28%) and Japan (8%). This distribution enables meaningful cross-regional analysis while reflecting the current concentration of quantum computing activity in established technology hubs. Countries with n≥9 respondents are analyzed in detail in Section 7.


Respondents by Country/Region
United States
European Union
Other
Japan
United Kingdom
South Korea
India
Canada
Israel
Australia
32.6%
28.2%
11.3%
7.6%
5.8%
3.8%
3.1%
3.1%
3.1%
1.4%
0
5
10
15
20
25
30
35

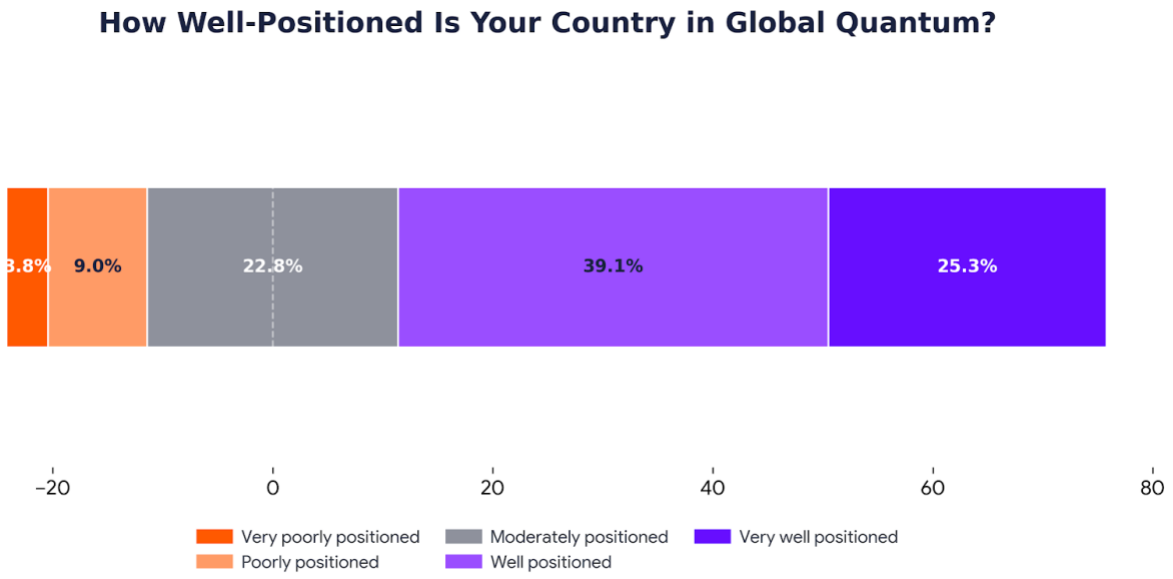
Section 2: Industry Perceptions & Timeline Expectations

Q6: National Positioning Assessment

How well-positioned is your country to play an important role in the global quantum computing industry?

Response	Count	Percentage
Very well positioned	73	25.3%
Well positioned	113	39.1%
Moderately positioned	66	22.8%
Poorly positioned	26	9.0%
Very poorly positioned	11	3.8%

Nearly two-thirds (64.4%) believe their country is well or very well positioned in quantum computing. This confidence varies significantly by country (see Country Profiles section).



Year-over-Year Trend

This represents a notable moderation from the 2025 survey, where over 45% selected "very well positioned" alone—a 20 percentage point decline at the highest confidence level. The shift likely reflects post-hype recalibration as organizations move from exploration to implementation and confront the gap between technical demonstrations and commercial deployment.

Q7: Comparative National Progress

Compared to other countries, how would you rate your country's overall progress in adopting quantum computing?

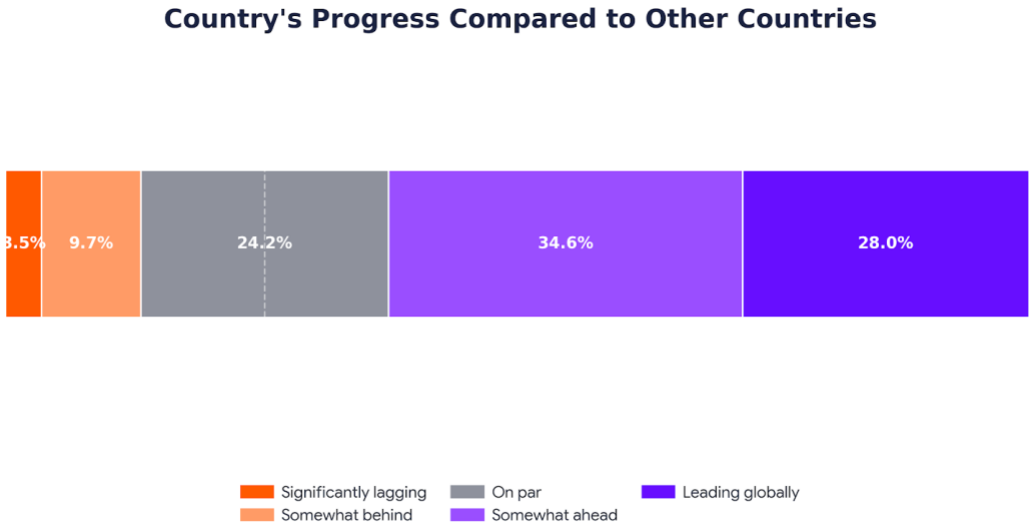
Response	Count	Percentage
Leading globally	81	28.0%
Somewhat ahead	100	34.6%
On par with most countries	70	24.2%
Somewhat behind	28	9.7%
Significantly lagging	10	3.5%

63% rate their country as ahead or leading globally. Strong correlation with Q6 (rho=0.63, p<0.001) indicates consistent self-assessment patterns.

The National Confidence Cluster

The strongest ordinal correlation in the dataset links country positioning (Q6) with country progress (Q7): ρ=0.674 (p<0.001). This tight coupling indicates that respondents form coherent "national confidence" attitudes—those who believe their country is well-positioned also believe it is leading, and vice versa.

More notably, this confidence extends to organizational preparedness (Q6↔Q13: ρ=0.325, p=0.008). Respondents anchor their organizational readiness assessments partly in their national ecosystem narrative. Whether this reflects real ecosystem advantage or optimism bias is unclear, but it suggests that national quantum initiatives have psychological spillover effects on organizational confidence.

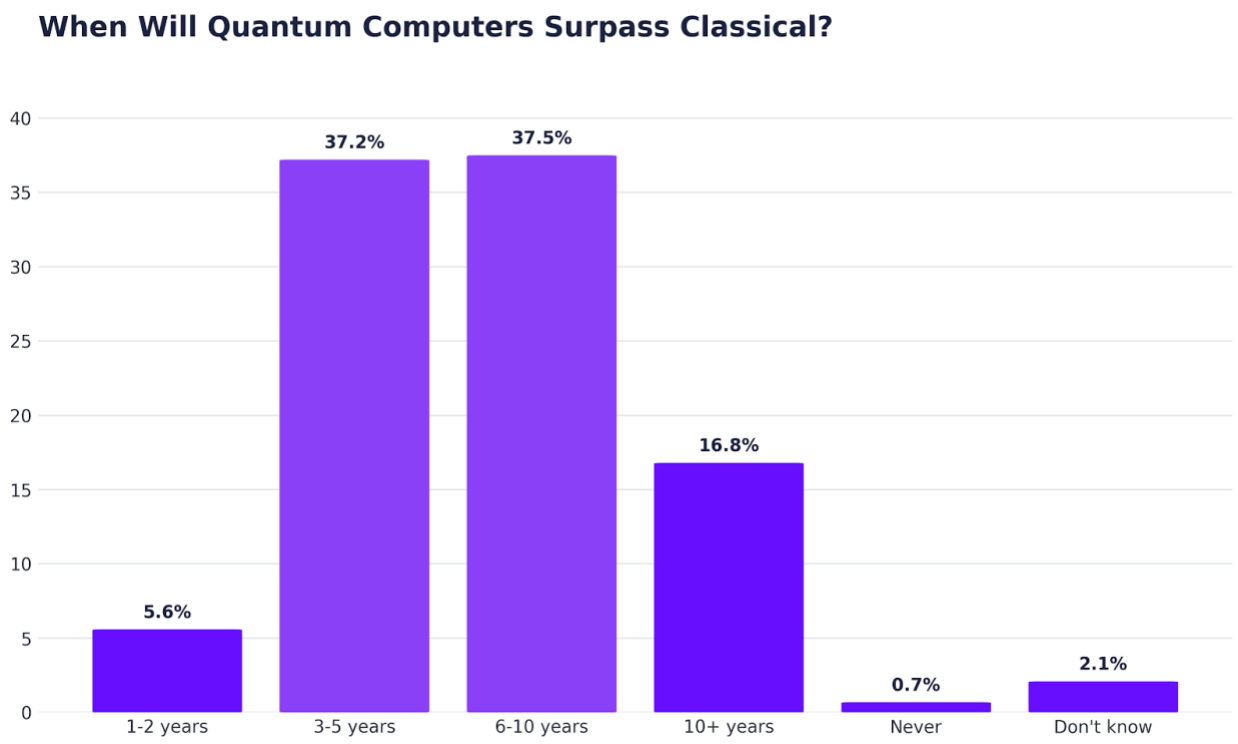


Q8: Quantum Superiority Timeline

When do you expect quantum computers to be a superior alternative to classical computing for certain workloads?

Timeline	Count	Percentage
Within 1-2 years	16	5.6%
Within 3-5 years	106	37.2%
Within 6-10 years	107	37.5%
More than 10 years	48	16.8%
Never	2	0.7%
Don't know	6	2.1%

The modal response is 6-10 years (38%), with 43% expecting superiority within 5 years. This represents a more optimistic outlook than typical industry analyst projections, though academic respondents tend toward longer timelines.



Q9: Classical Computing Limitations

To what extent are your organization's current classical HPC workloads limited by compute time or complexity (the "Classical Wall")?

Response	Count	Percentage
Critical limitation	59	20.7%
Moderate limitation	118	41.4%
No limitation	20	7.0%
Don't know/Not applicable	88	30.9%

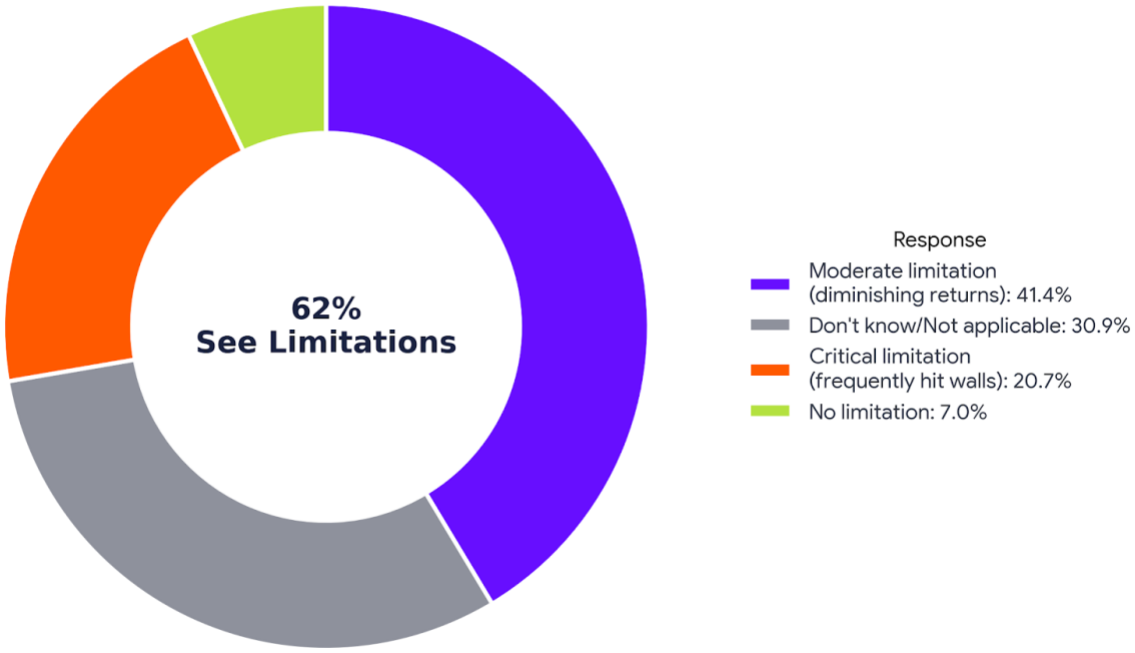
62% of respondents with applicable workloads report moderate to critical classical computing limitations, validating quantum computing's potential value proposition for computationally demanding applications.

This finding represents the core economic case for quantum computing adoption. The 62% experiencing classical limitations are not waiting for theoretical capability—they face real computational constraints today. Cross-referencing with Q12 reveals that "Simulation (materials, chemistry, drug discovery)" leads planned use cases at 42%, precisely the domain where classical methods hit exponential scaling walls.

The implications are significant:

- **Pharma and materials science are the beachhead markets.** These sectors face problems (molecular simulation, protein folding, battery chemistry) where classical approximations are inadequate and quantum advantage is theoretically demonstrable.
- **Optimization use cases (26%) may require patience.** Unlike simulation, where quantum advantage maps directly to physical chemistry, optimization problems often yield to classical heuristics. The survey suggests realistic expectations here.
- **The 31% "don't know/not applicable" cohort likely includes organizations that have not yet encountered computational limits**—they may become quantum-ready when their workloads scale.

Classical HPC Workload Limitations



Q10: Commercialization Progress Assessment

How would you characterize the current state of quantum computing commercialization?

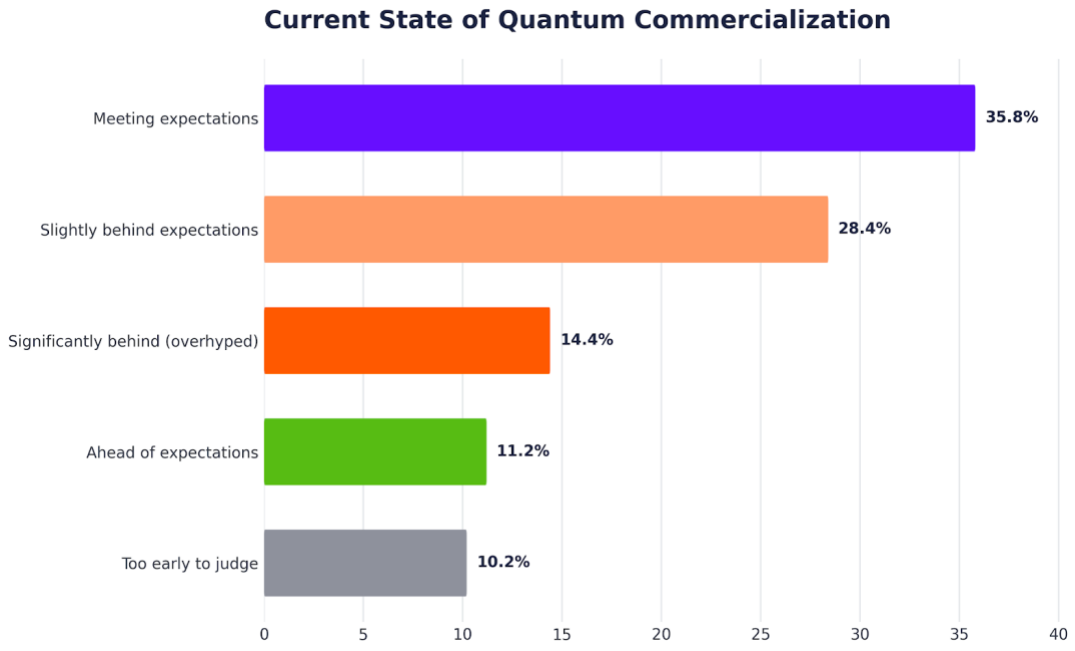
Response	Count	Percentage
Ahead of expectations	32	11.2%
Meeting expectations	102	35.8%
Slightly behind expectations	81	28.4%
Significantly behind expectations	41	14.4%
Too early to judge	29	10.2%

While 47% view commercialization as meeting or exceeding expectations, 43% believe it is behind expectations. This suggests growing pressure on the industry to demonstrate tangible commercial value.

The “Show Me” Phase

The 43% viewing commercialization as behind expectations— Combined with broader indicators of investment discipline explored later in this series, this signals that the ecosystem has entered a ‘show me’ phase. Organizations are no longer willing to pay for "quantum potential"; they are demanding "quantum performance."

This reflects rising expectations for evidence of practical, deployable value rather than benchmark demonstrations alone.



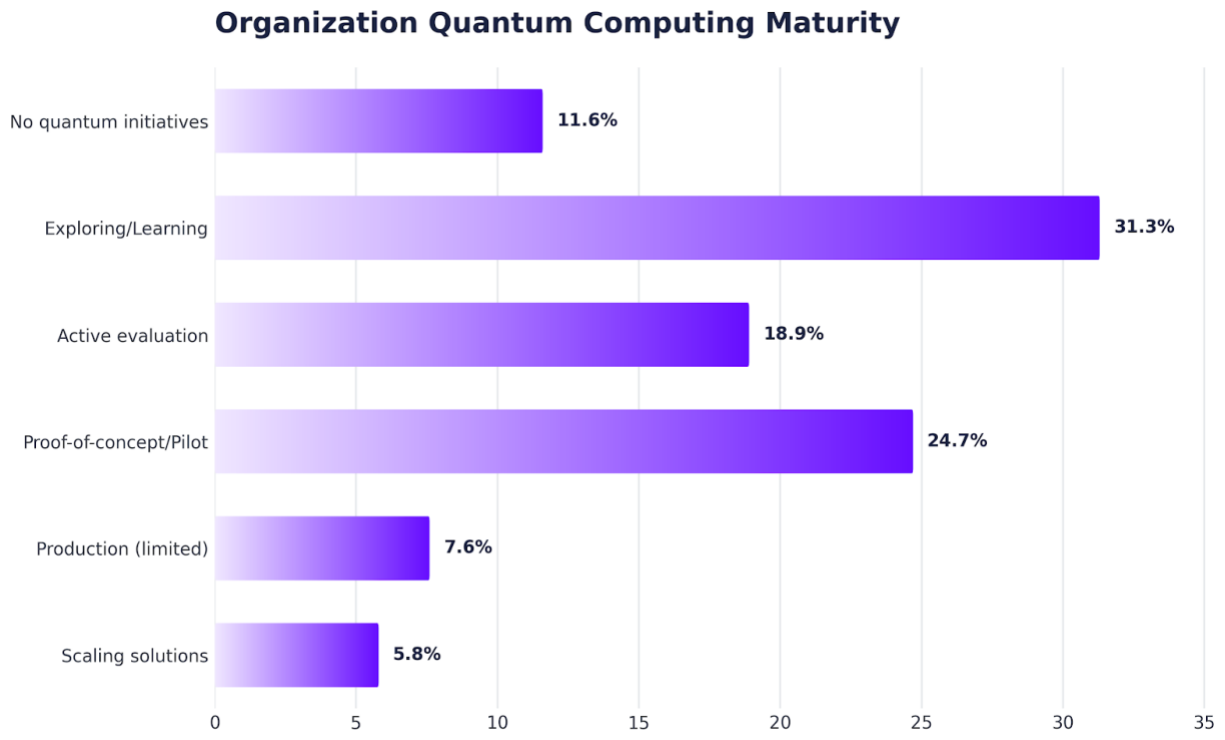
Section 3: Organizational Readiness

Q11: Quantum Computing Maturity

What best describes your organization's current quantum computing maturity?

Maturity Stage	Count	Percentage
No initiatives, no plans	32	11.6%
Exploring/learning phase	86	31.3%
Active evaluation	52	18.9%
Proof-of-concept/pilot	68	24.7%
Production deployment (limited)	21	7.6%
Scaling quantum solutions	16	5.8%

The maturity distribution reveals a field in transition: 56% are actively engaged (exploring through PoC), while 13% have reached production. The 12% with no initiatives represents a shrinking but persistent segment.



Q12: Primary Use Cases (Multi-select, n=274 engaged)

What do you primarily use quantum computing for today, or plan to use it for?

Use Case	Count	% of Engaged
Scientific research and experimentation	207	75.5%
Algorithm development and benchmarking	128	46.7%
Simulation (materials, chemistry, drug discovery)	116	42.3%
Proof-of-concept for business applications	76	27.7%
Machine learning enhancement	74	27.0%
Optimization (logistics, scheduling, portfolio)	70	25.5%
Cryptography and security	47	17.2%
Financial modeling	23	8.4%
Operational deployment with measured outcomes	14	5.1%

Scientific research dominates (76%), followed by algorithm development (47%) and simulation (42%). The low operational deployment rate (5%) underscores the experimental nature of current quantum usage.

Use-Case Bundles: Behavioral Market Segments

Correlation analysis of Q12 multi-select responses reveals that use-case selections are not random—they cluster into coherent "bundles" that define distinct market segments:

Bundle 1: Algorithm-R&D Cohort

- Algorithm development ↔ Simulation (φ=0.374, p<0.001)
- Algorithm development ↔ ML enhancement (φ=0.364, p<0.001)
- Optimization ↔ ML enhancement (φ=0.380, p<0.001)

This cohort is building "quantum workflow literacy"—they approach quantum as a research capability to be mastered across multiple domains.

Bundle 2: Enterprise-Value Cohort

- Optimization ↔ Financial modeling (φ=0.321, p<0.001)
- Cryptography/security ↔ Financial modeling (φ=0.353, p<0.001)
- PoC business ↔ Financial modeling (φ=0.334, p<0.001)

This cohort frames quantum through business-value proxies—they seek near-term commercial applications rather than capability building.

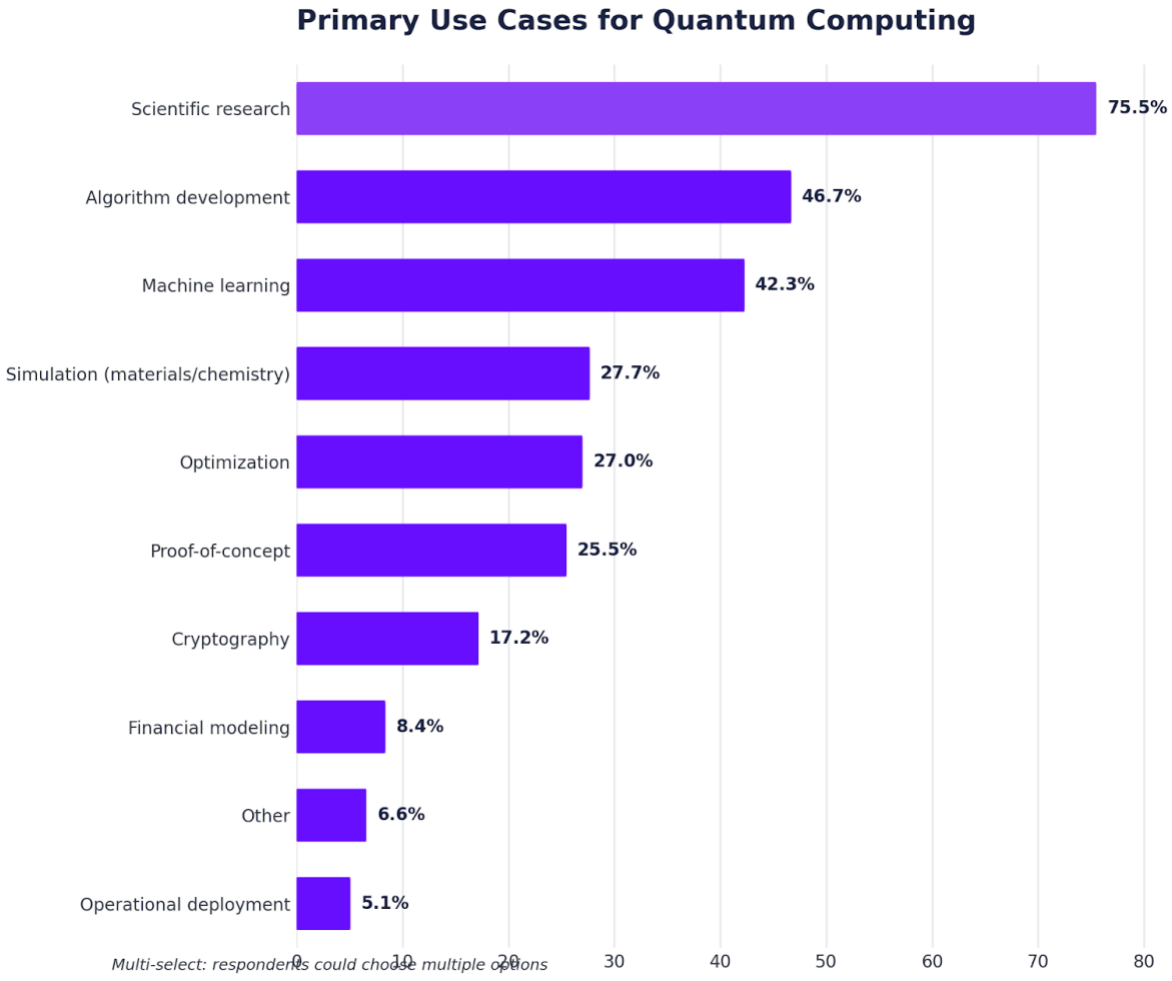
Segmentation Implication: These bundles suggest two distinct buyer personas: "capability builders" (typically academic/research) and "value seekers" (typically enterprise). Marketing and product positioning should address these cohorts separately rather than attempting universal messaging.

Sector-Specific Use Case Alignment

Correlation analysis confirms that use-case priorities are not uniform across sectors (χ^2=62.1, V=0.38, p<0.001):

Sector	Dominant Use Case	Over-Index Factor
Pharma/Life Sciences	Simulation (materials, chemistry, drug discovery)	+2.3x
Finance/Banking	Optimization + Financial modeling	+1.8x
Aerospace/Defense	Cryptography and security	+2.1x

The pharma-simulation linkage validates the "beachhead market" thesis: pharmaceutical companies face quantum-native problems (molecular simulation, protein folding) where classical approximations fail. Their 2.3x over-index on simulation suggests this sector will be first to demonstrate commercial quantum value—not finance, despite early hype.


Primary Use Cases for Quantum Computing
Scientific research
75.5%
Algorithm development
46.7%
Machine learning
42.3%
Simulation (materials/chemistry)
27.7%
Optimization
27.0%
Proof-of-concept
25.5%
Cryptography
17.2%
Financial modeling
8.4%
Other
6.6%
Operational deployment
5.1%
0
10
20
30
40
50
60
70
80
Multi-select: respondents could choose multiple options

Q13: Organizational Preparedness

How prepared is your organization to adopt or expand quantum computing if it becomes advantageous within the next 2–3 years?

Preparedness Level	Count	Percentage
Very prepared	68	24.7%
Somewhat prepared	84	30.5%
Neutral/monitoring	69	25.1%
Not very prepared	29	10.5%
Not at all prepared	25	9.1%

55% report being somewhat or very prepared for quantum adoption. Strong correlation with role level ($V=0.34$, $p<0.001$): senior leaders report higher organizational preparedness.

Year-over-Year Trend

Preparedness has declined from 65%+ in the 2025 survey to 55%—a 10 percentage point drop despite a year of technical progress. This apparent paradox resolves when considering that the bar for "prepared" has risen: fault tolerance is now table stakes, and organizations recognize that true quantum-readiness requires capabilities few yet possess.

The Preparedness Paradox: Statistical Confirmation

The negative correlation between organization size and preparedness ($\rho=-0.31$, $p=0.001$) confirms what the report terms the "Preparedness Paradox": **larger organizations feel *less* prepared than smaller, agile entities.**

This "incumbent inertia" likely reflects:

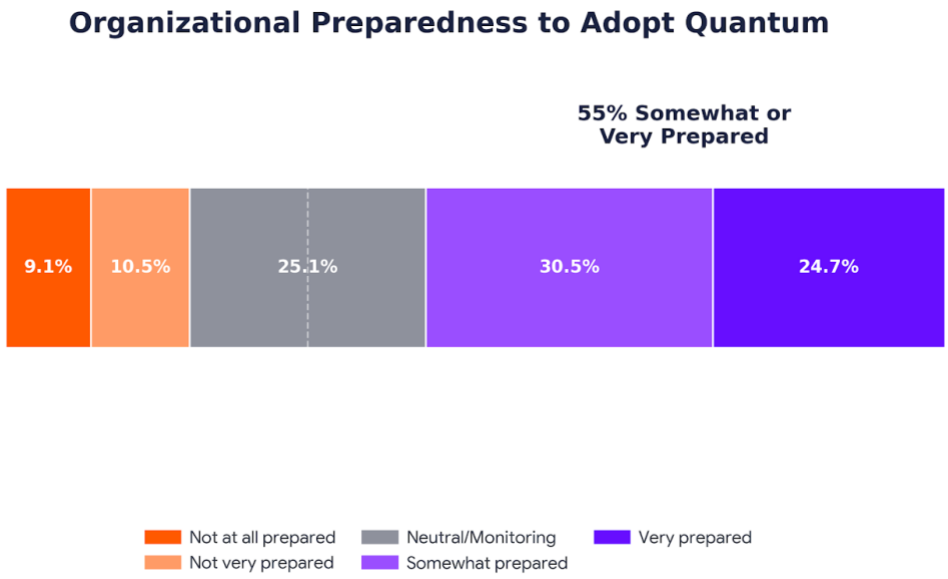
- Legacy system integration complexity
- Longer internal approval cycles
- Competing budget priorities across established business units
- Risk aversion in organizations with more to lose

Smaller organizations, often "born quantum," can orient their entire R&D stack toward quantum-readiness without fighting institutional friction.

Null Finding: Timeline Beliefs and Preparedness Are Disconnected

Those expecting sooner quantum commercialization do *not* feel more prepared ($\rho=0.11$, $p=0.37$). This disconnect suggests that timeline optimism and organizational readiness are independent attitudes—organizations can believe quantum is coming soon while acknowledging they are not ready, or feel prepared while expecting a long timeline. This creates a high-opportunity segment: organizations that

expect quantum value within 5 years but report low preparedness. They have urgency but lack capability—an ideal target for vendors offering accelerated readiness programs.



Section 4: Country Profiles: Confidence and Readiness

Analysis of countries with n≥9 respondents reveals significant variation in confidence levels and technology preferences. The country-level variation reflects not just sentiment but strategic positioning. These differences have implications for technology providers entering regional markets and for policymakers assessing competitive positioning.

Global Baselines

- Q6 Country Well Positioned: 64.4%
- Q7 Country Ahead: 62.6%
- Q8 Superiority <5 years: 42.8%
- Q13 Org Very Prepared: 24.7%

Country Comparison

Country	n	Q6 Positioned	Q7 Ahead	Q13 Prepared	Top Modality
United States	95	82.1% (+18)	89.5% (+27)	30.7%	Too early
European Union	82	50.6% (-14)	48.1% (-15)	21.2%	Too early
Japan	22	50.0% (-14)	45.5% (-17)	10.0%	Too early
United Kingdom	17	88.2% (+24)	82.4% (+20)	33.3%	Superconducting
South Korea	11	40.0% (-24)	30.0% (-33)	20.0%	Too early
Canada	9	88.9% (+25)	77.8% (+15)	66.7%	Superconducting
India	9	55.6% (-9)	66.7% (+4)	44.4%	Neutral Atoms
Israel	9	55.6% (-9)	44.4% (-18)	12.5%	Too early

Key Regional Insights

The Anglo-American Confidence Cluster

US (82%), UK (88%), and Canada (89%) show positioning confidence significantly above the global baseline (64%). This cluster shares:

- Deep integration with U.S. technology ecosystem
- Established defense/intelligence quantum programs
- Strong academic-industry pipelines

These markets exhibit higher confidence and lower sensitivity to regional constraints when assessing quantum readiness.

European Caution

EU respondents show notably lower confidence (51% positioned, 48% ahead) versus the global baseline. This likely reflects:

- Fragmented national programs without unified industrial policy
- Dependency concerns about U.S. and Asian supply chains
- Higher sensitivity to sovereignty considerations

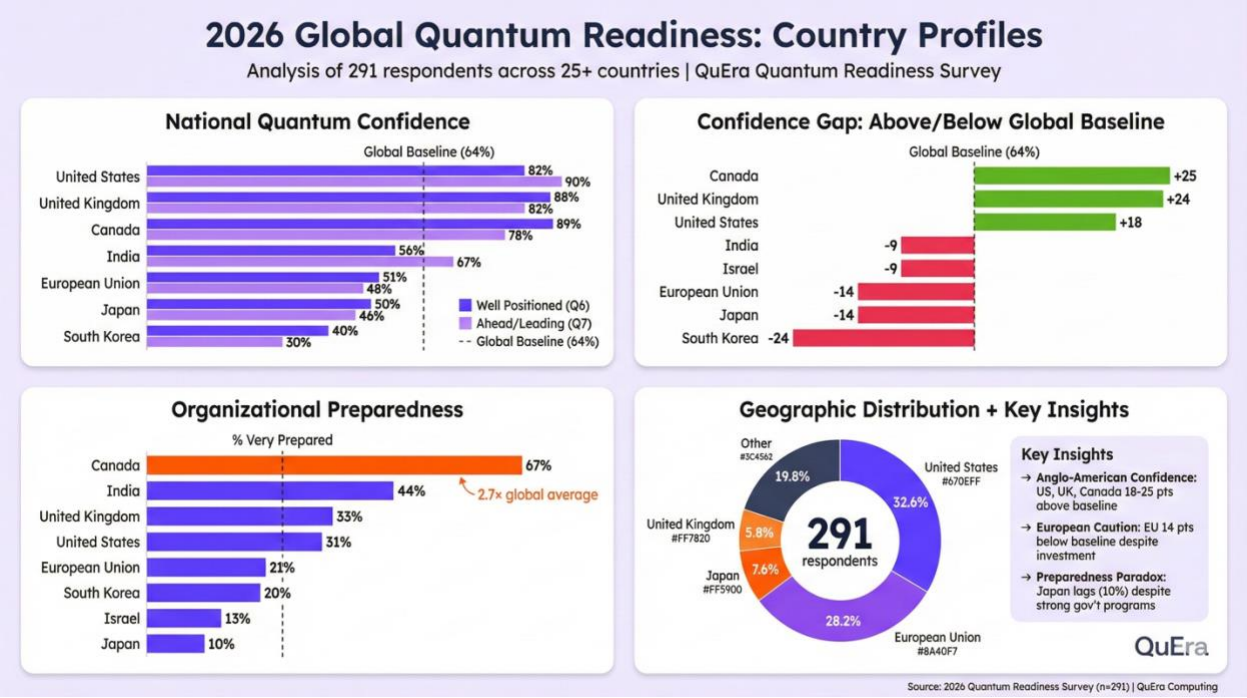
Asian Divergence

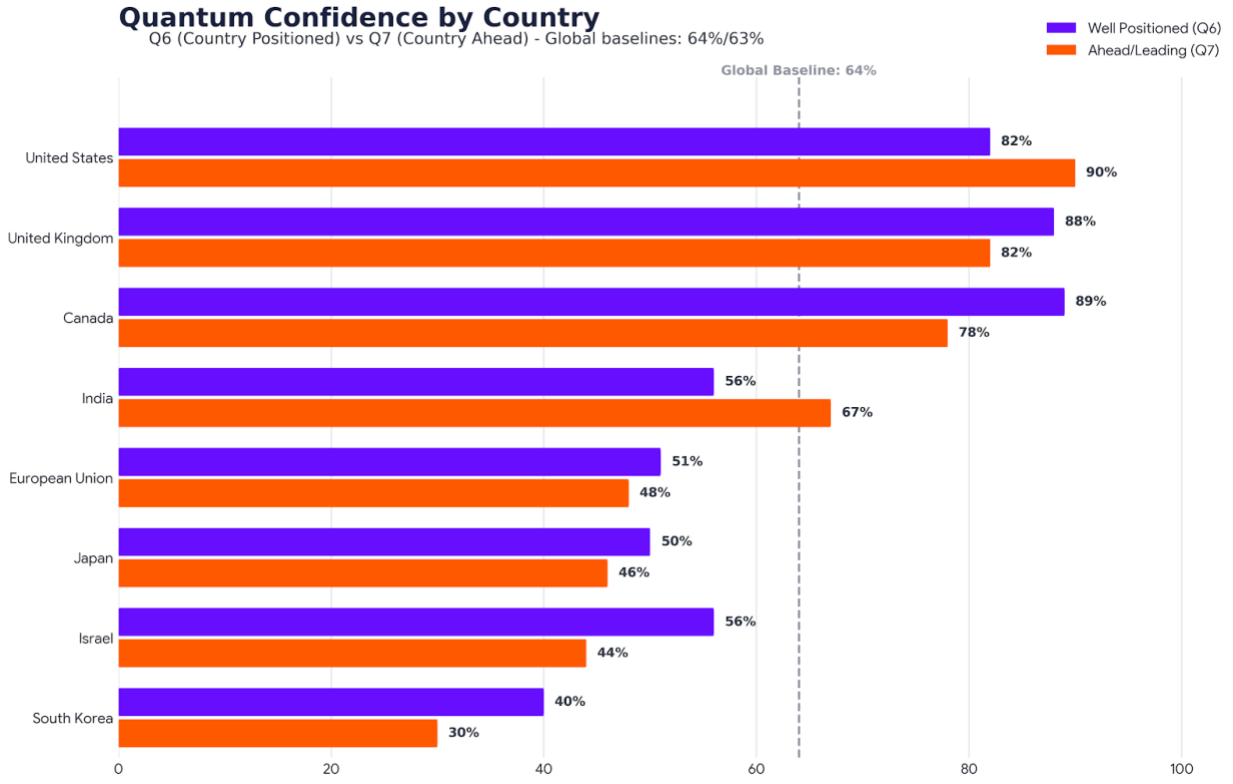
The Asian market presents three distinct profiles:

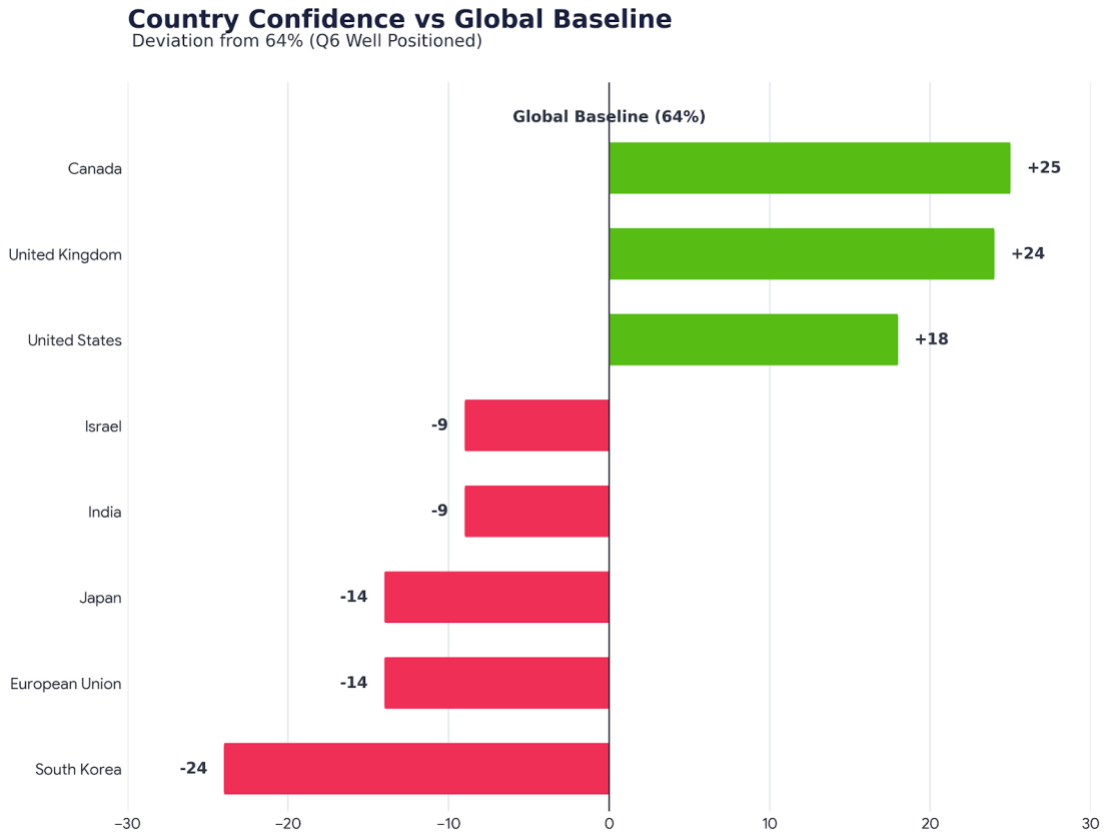
- **Japan (50% positioned, 10% prepared):** Conservative posture despite significant government investment. The low preparedness (10% vs 25% global) suggests organizational inertia in large conglomerates. Strong focus on simulation use cases aligns with manufacturing/materials strength.
- **South Korea (40% positioned, 30% behind):** Late-mover anxiety driving aggressive catch-up investment. Reflects interest in bypassing intermediate development stages.
- **India (56% positioned, 78% expect <5 years):** Most optimistic timelines in the survey. Uniquely favors neutral atoms. Leveraging software engineering talent for application-layer focus. “Cost-effectiveness" is overwhelmingly top criterion— Reflecting a strong emphasis on application-layer development and cost-driven approaches.

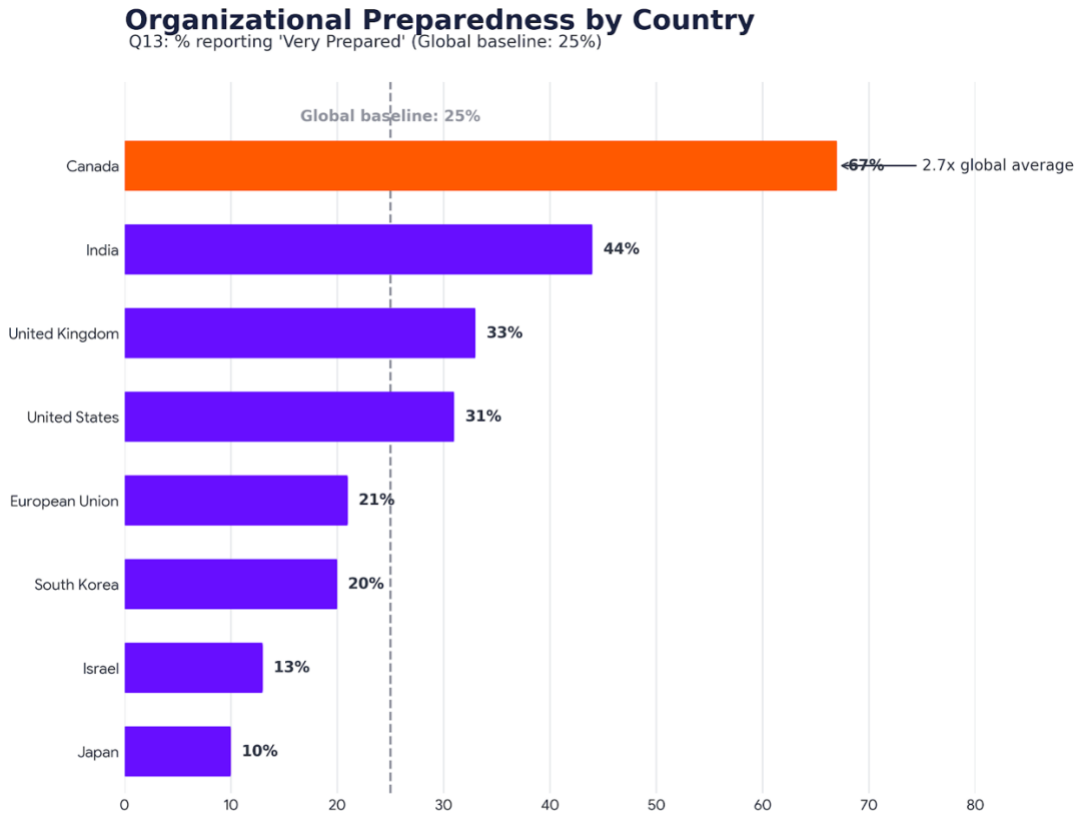
The Preparedness Gap

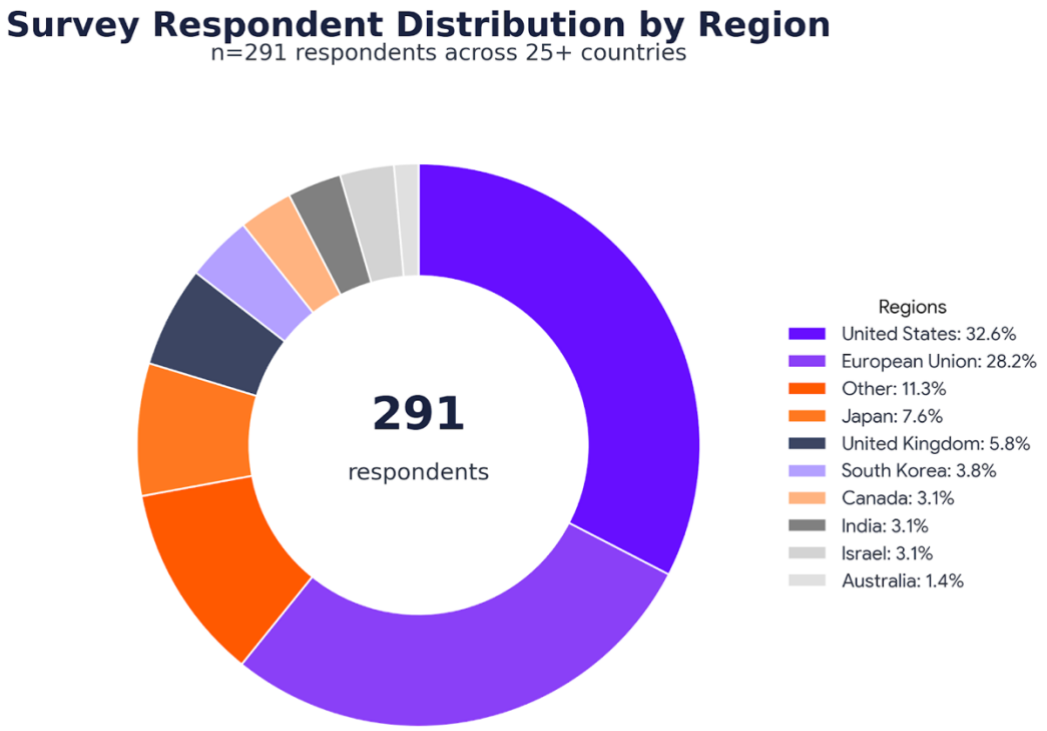
Canada leads organizational preparedness (67%); Japan lags (10%). This divergence despite similar government investment levels suggests that cultural/organizational factors—not just funding—determine readiness. Large incumbent organizations (common in Japan) may face adoption barriers that startups (more prevalent in Canada's quantum ecosystem) avoid.




Quantum Confidence by Country
Q6 (Country Positioned) vs Q7 (Country Ahead) - Global baselines: 64%/63%
Well Positioned (Q6)
Ahead/Leading (Q7)
Global Baseline: 64%
United States
82%
90%
United Kingdom
88%
82%
Canada
89%
78%
India
56%
67%
European Union
51%
48%
Japan
50%
46%
Israel
56%
44%
South Korea
40%
30%
0
20
40
60
80
100


Country Confidence vs Global Baseline
Deviation from 64% (Q6 Well Positioned)
Global Baseline (64%)
Canada
United Kingdom
United States
Israel
India
Japan
European Union
South Korea
+25
+24
+18
-9
-9
-14
-14
-24
−30
−20
−10
0
10
20
30


Organizational Preparedness by Country
Q13: % reporting 'Very Prepared' (Global baseline: 25%)
Global baseline: 25%
Canada
India
United Kingdom
United States
European Union
South Korea
Israel
Japan
67%
2.7x global average
44%
33%
31%
21%
20%
13%
10%
0
10
20
30
40
50
60
70
80



The Sovereignty Dimension by Region

The sovereignty posture varies predictably by region:

Region	Hypothesized Sovereignty Stance	Observed Orientation
United States	Lower sovereignty sensitivity	Confident in supply chain security; global sourcing acceptable
European Union	Higher sovereignty sensitivity	Regional/EU provider preference; Differences in regulatory oversight across regions
Japan	Allied sovereignty	Aligned with U.S. ecosystem but seeking domestic capability
India	Pragmatic/cost-driven	Will accept global providers if price is right

These differences highlight how regional context shapes perceptions of readiness and confidence.

Limitations

- Sample composition: 48% academic respondents may bias toward research-oriented perspectives. Enterprise viewpoints may be underrepresented.
- Self-selection: Respondents likely have higher-than-average quantum engagement, potentially overestimating industry readiness.
- Regional representation: While globally distributed, sample sizes for some countries (n<10) limit generalizability.
- Point-in-time: Survey captures January 2026 perspectives; rapid field evolution may quickly date findings.
- Multi-select interpretation: Percentages based on engaged respondents only; non-response patterns not analyzed.
- External context integration: This report incorporates industry context from sources external to the survey to aid interpretation.

What Comes Next

This report represents the first installment in a three-part analysis of the 2026 Quantum Readiness Survey. Part 1 has focused on establishing a market reality check: how confidence, preparedness, and demand signals are evolving as organizations move from belief in quantum computing's potential to benchmarking its readiness against real-world constraints.

Subsequent installments will examine how this baseline translates into **investment and procurement behavior (Part 2)** and into **technology, talent, and roadmap expectations (Part 3)**. Together, the full series is intended to provide a coherent view of where the quantum market stands today, how decisions are being made, and what factors will define leadership in the years ahead.

Appendix: Survey Instrument Summary

Question	Type	Valid n
Q1: Primary Interest	Single-select	291
Q2: Role Level	Single-select	291
Q3: Organization Size	Single-select	291
Q4: Primary Sector	Single-select	291
Q5: Country	Single-select w/ Other	291
Q6: Country Positioning	Single-select	289
Q7: Country Progress	Single-select	289
Q8: Superiority Timeline	Single-select	285
Q9: Classical Wall	Single-select	285
Q10: Commercialization State	Single-select	285
Q11: Org QC Maturity	Single-select	275
Q12: Use Cases	Multi-select (10 options)	274
Q13: Org Preparedness	Single-select	275

About QuEra

QuEra is putting quantum to work. As the scientific and commercial leader in neutral-atom quantum computing, QuEra helps enterprise innovators leverage quantum to gain competitive advantage, support HPC centers as they help users tackle classically intractable problems, and enable government programs to build national capability and sovereign infrastructure. QuEra does this through a unique quantum innovation platform, combining quantum systems available on-premises and via the cloud with application co-design and collaborative research. Born at Harvard and MIT, still advancing together, QuEra operates globally from Boston, Tokyo, and the UK. As quantum computing moves from “one day” to “Day One,” QuEra delivers practical impact today while advancing toward large-scale, fault-tolerant systems. See what's possible and get started at www.quera.com