2026 QUANTUM READINESS SURVEY

Executive Research Report – Part 2

Investment, Procurement, and the New Geography of Quantum Access

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January 2026

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

Commissioned by

QuEra Computing Inc.
Putting Quantum to Work

Boston, MA USA
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Executive Summary

This is Part 2 of the 2026 Quantum Readiness Survey, a three-part analytical series examining the state of quantum computing adoption across 291 stakeholders in 25+ countries.

Part 1 established 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 revealed a market in recalibration, with rising standards for readiness, compressing timelines, and simulation-heavy workloads driving the strongest demand signals.

Part 2 (this document) examines what happens when those beliefs meet budgets. It focuses on how organizations are translating their quantum ambitions into investment decisions, procurement strategies, and sourcing postures. The findings reveal a market where spending has stabilized rather than surged, where government funding remains the essential catalyst, and where sovereignty has emerged as a procurement filter that reshapes how and from whom organizations acquire quantum capability.

The central tension in the 2026 investment landscape is between strategic conviction and operational caution. Most organizations believe quantum computing will matter. Far fewer are willing to fund that belief aggressively. The 46% expecting flat budgets, combined with only 9% citing successful pilot results as their investment driver, confirms that the market has moved decisively from hype-driven spending to proof-driven allocation.

Meanwhile, a parallel transformation is underway in how organizations source quantum technology. Only 4.9% of respondents say sovereignty is not a factor in their procurement decisions. The purely globalized market model that characterized the industry's early years is ending. In its place, a stratified landscape is emerging where technical capability must be weighed against geopolitical provenance, and where a single global go-to-market strategy will systematically underperform.

Part 3 will complete the series by examining technology preferences, talent constraints, and roadmap expectations, including the fault-tolerance imperative that is reshaping vendor evaluation criteria.

Key Findings

- **Budget Consolidation, Not Contraction:** 44% anticipate budget increases in 2026; only 10% expect decreases. But 46% expect flat budgets, signaling a "hold" phase. The FOMO-driven investment era has ended, replaced by demand for proof points.
- **Government as Risk Underwriter:** Government mandates and grants are the leading budget driver (28%), more than competitive pressure (16%), successful pilots (9%), or classical computing limits (8%). Public funding continues to underwrite ecosystem risk that private capital avoids.

- **The C-Suite Reality Check:** Senior executives are significantly less bullish on dramatic budget increases than junior researchers (ρ=-0.29, p=0.002). Those closest to capital allocation are waiting for proof before releasing the next tranche.
- **Sovereignty Reshaping Procurement:** Only 4.9% say sovereignty is "not a factor" in technology selection. 62% actively factor sovereignty into procurement decisions. The strongest regional divergence in the dataset (V=0.41) separates U.S. performance-first sourcing from EU sovereignty-first procurement.
- **Challenge Hierarchy Stable but Evolving:** Technology maturity (58%) and cost (42%) lead adoption challenges, but barriers shift with organizational maturity. ROI uncertainty drops 17 percentage points as organizations gain experience; integration challenges rise 9 points.
- **Government/Defense as Anchor Tenant:** 24% identify government and defense as the segment most likely to drive commercialization, followed by large enterprises (20%). Financial services ranks last (5%), contradicting early hype.

Strategic Implications

For Technology Providers

- **Sales cycles now run through procurement rigor, not executive enthusiasm.** The executive pessimism finding means business cases must demonstrate measurable returns, not theoretical potential. Vendor sales teams should prepare for longer evaluation periods and more demanding proof-of-concept requirements.
- **Segment messaging by maturity stage.** Early-stage organizations need ROI frameworks and talent access; advanced organizations need integration support and hybrid classical-quantum tooling. The 17-point drop in ROI uncertainty as organizations mature confirms that experience resolves early objections.
- **Regional strategies are non-negotiable.** U.S. respondents favor performance-first sourcing (35%); EU respondents prioritize sovereignty (24%). A single global pitch will fail. Lead with capability in North America; lead with sovereignty credentials, data residency guarantees, and on-premises options in Europe.
- **Government engagement is a commercial imperative.** With 28% citing government mandates/grants as their primary budget driver and 24% expecting government/defense to lead commercialization, public-sector relationships are not optional. They are the primary revenue path in the near term.

For Enterprise Adopters

- **The classical wall is your strongest internal business case.** The 8% citing classical simulation limits as their budget driver are the early commercial market. Identify workloads where classical computing is already constraining outcomes and build your quantum investment case around those specific problems.
- **Strategy formalization correlates with sourcing confidence.** Organizations with funded roadmaps over-index on both global best-technology sourcing and in-house development. Without a formal strategy, procurement defaults to hedging behavior that delays capability building.
- **Don't wait for finance to lead.** Financial services ranks last (5%) in expected near-term commercialization. Pharma/life sciences (11%) and government/defense (24%) are where early traction will emerge.

For Policymakers

- **Government funding remains the single largest investment driver.** The 28% figure is not a market failure; it reflects the reality that quantum computing is pre-commercial. Premature withdrawal of public funding risks stalling an ecosystem that has not yet reached self-sustaining commercial momentum.
- **Sovereignty mandates need calibration.** 46% balance sovereignty with technology quality; only 16% strongly prioritize sovereignty regardless of capability. Heavy-handed localization mandates may restrict access to leading technology without building domestic capability. Light-touch approaches that incentivize local partnerships while preserving global access are more likely to succeed.
- **Defense/government is expected to lead commercialization.** 24% see this segment as primary driver. Public-sector use cases may establish the beachhead for broader commercial adoption.

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. Full methodology details, including sample composition, geographic distribution, and analytical approach, are provided in Part 1 of this report series.

Part 2 analyzes questions Q14 through Q17 (adoption challenges, strategy, budget expectations, and budget drivers) and Q21 through Q23 (sourcing approach, sovereignty importance, and commercialization driver segment). Cross-tabulations with demographic variables from Part 1 (Q1-Q5) are included where statistically significant. Statistical methods include Spearman's rho for ordinal variables, chi-square with Cramér's V for categorical associations, and phi coefficients for binary co-occurrence. All p-values were adjusted using Benjamini-Hochberg FDR correction (α=0.05).

Note on Part 1 Context: Several findings in this report reference data from Part 1 (Q6-Q13) to provide analytical context, including the classical computing limitations finding (Q9, 62%), commercialization progress assessment (Q10, 43% behind expectations), organizational maturity distribution (Q11), and use case priorities (Q12). Readers are encouraged to review Part 1 for the full baseline analysis.

Detailed Findings

Section 3 (continued): Organizational Readiness

Earlier questions in this section (see Part 1 of this report) examined organizational maturity (Q11), use cases (Q12), and preparedness (Q13). This section continues with the barriers organizations face and whether they have formalized their quantum ambitions into strategy and budgets.

Q14: Adoption Challenges (Multi-select, n=274 engaged)

What challenges does your organization face in adopting quantum computing?

Challenge	Count	% of Engaged
Technology not mature enough	159	58.0%
High costs of implementation	116	42.3%
Unclear business value/ROI	109	39.8%
Lack of skilled workforce	101	36.9%
Limited access to quantum hardware	82	29.9%
Immature algorithms for problem domains	75	27.4%
Competing budget priorities	61	22.3%
Lack of proven results from pilots	53	19.3%
Integration difficulty with classical systems	31	11.3%
Lack of executive buy-in	25	9.1%
Regulatory uncertainty	19	6.9%
Security/data privacy concerns	12	4.4%

Technology maturity (58%) and cost (42%) lead adoption challenges. Notably, talent shortage (37%) ranks fourth, highlighting workforce development needs.

The Talent Constraint: Innovation's Binding Limit

The prominence of "Lack of skilled workforce or expertise" (37%) as an adoption challenge—ranking higher than limited hardware access (30%) or immature algorithms (27%)—warrants dedicated analysis. This is not a generic skills shortage; it reflects a specific deficit in highly specialized roles.

The QEC Talent Gap

The industry's pivot to fault tolerance has created acute demand for engineers who understand QEC codes, decoders, and fault-tolerant architecture. Survey respondents in Q24 overwhelmingly cited error correction advances (33% of mentions) as the year's most impactful development—yet organizations cannot staff teams to implement these advances.

[EXTERNAL CONTEXT: External estimates suggest the global pool of QEC specialists numbers fewer than 2,500 individuals, with a 3:1 ratio of open quantum positions to qualified candidates. The PhD pipeline for quantum physics requires 5-7 years, meaning this bottleneck will persist through at least 2030.]

Organizational Implications

- **The 20% citing "Support and professional services" as a selection criterion (Q20) reflects talent scarcity.** Organizations cannot build internal teams and must rely on vendor expertise.
- **The academic sector paradox:** Academia represents 48% of respondents (Q4), yet academic institutions themselves cite workforce shortage as a challenge. Universities appear to struggle to retain the talent they produce, losing them to well-funded private sector players or national laboratories.
- **Talent scarcity compounds sovereignty concerns.** Nations compete for the same small pool of global specialists, often using visa policies and grants to attract researchers—creating friction with sovereignty mandates.

Statistical confirmation: Academia cites "Lack of skilled workforce" at significantly higher rates than technology providers (χ^2=24.1, φ=0.29, p=0.022). This validates the "academic talent paradox"—universities produce quantum talent but cannot retain them against well-funded private sector competition. The very institutions training the next generation of QEC engineers are losing them before they can contribute to academic research programs.

The implication for enterprise adopters: investment in workforce development may yield higher returns than investment in hardware access. The organization that trains QEC engineers today may outpace competitors regardless of which hardware platform ultimately dominates.

Challenge Evolution: How Barriers Shift with Maturity

Statistical analysis reveals that adoption challenges are not static—they evolve as organizations mature. Comparing early-stage organizations (no plans + exploring, n=118) with advanced-stage organizations (PoC + evaluation + production + scaling, n=157):

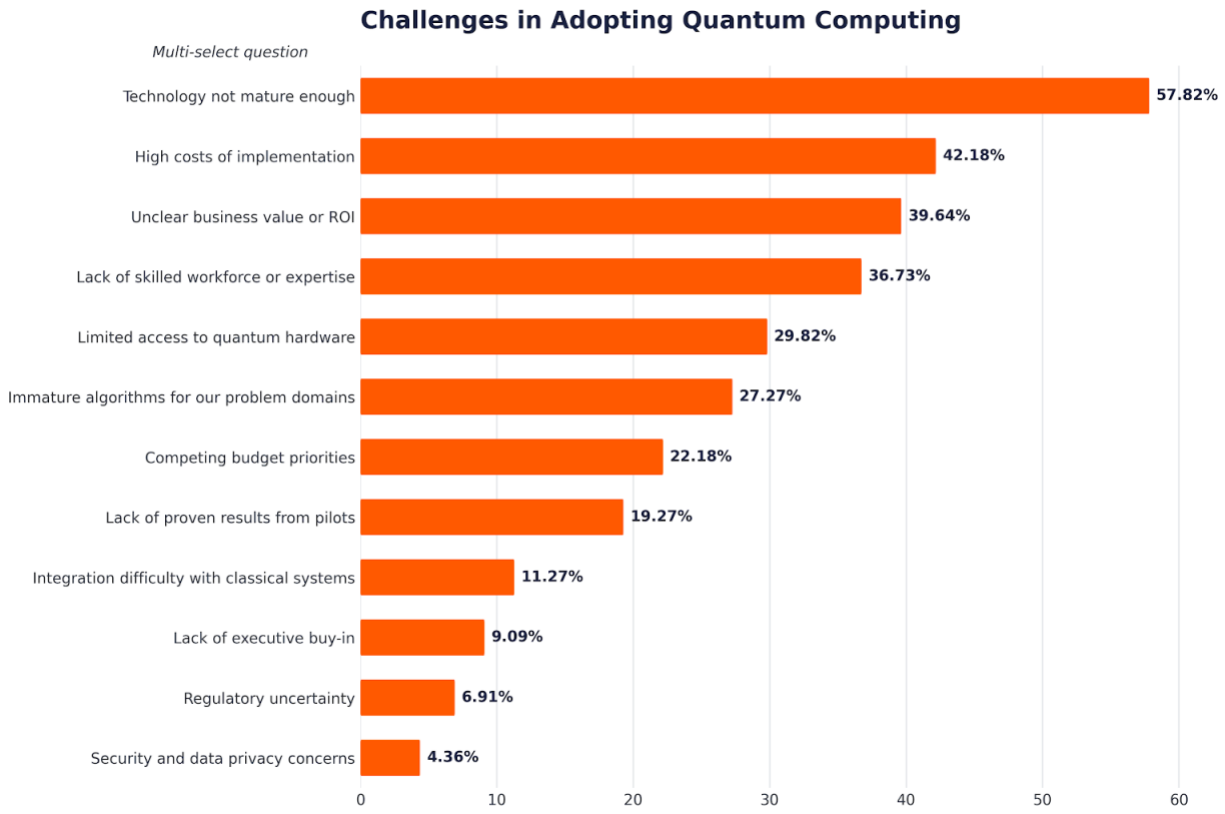
Challenge	Early Stage	Advanced Stage	Δ
Unclear ROI	49.2%	32.5%	-16.7pp**
Workforce Gaps	43.2%	31.8%	-11.4pp*
Technology Immaturity	59.3%	56.7%	-2.6%

Cost Concerns	45.8%	39.5%	-6.3%
Integration Challenges	22.0%	31.2%	+9.2pp**
Hardware Access	28.0%	31.2%	+3.2%

*p<0.05, **p<0.01 (chi-square test)

The statistically significant decrease in ROI uncertainty (-16.7pp, p=0.001) and workforce concerns (-11.4pp, p=0.017) suggests these barriers resolve through experience. Conversely, integration challenges *increase* (+9.2pp) as organizations move from theory to implementation—practical friction emerges later in the adoption journey.

Implication: Technology providers should segment messaging by maturity stage. Early-stage organizations need ROI frameworks and talent access; advanced organizations need integration support and hybrid classical-quantum tooling.

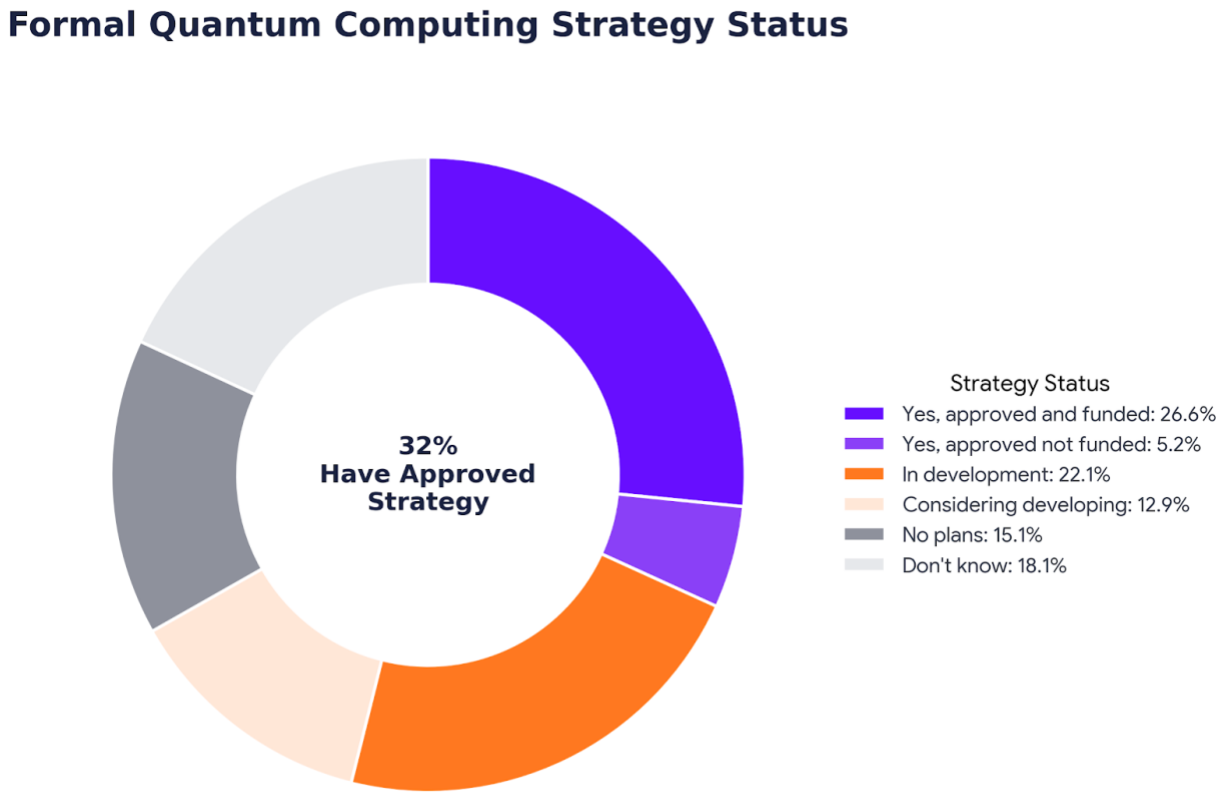


Q15: Quantum Computing Strategy

Does your organization have a formal quantum computing strategy or roadmap?

Strategy Status	Count	Percentage
Yes - approved and funded	72	26.6%
Yes - approved, not yet funded	14	5.2%
In development	60	22.1%
No - but considering	35	12.9%
No - and no plans	41	15.1%
Don't know	49	18.1%

54% have or are developing a formal quantum strategy. Organization size correlates significantly with strategy presence (V=0.17, p=0.03): larger organizations more likely to have formal roadmaps.



Section 4: Investment Outlook

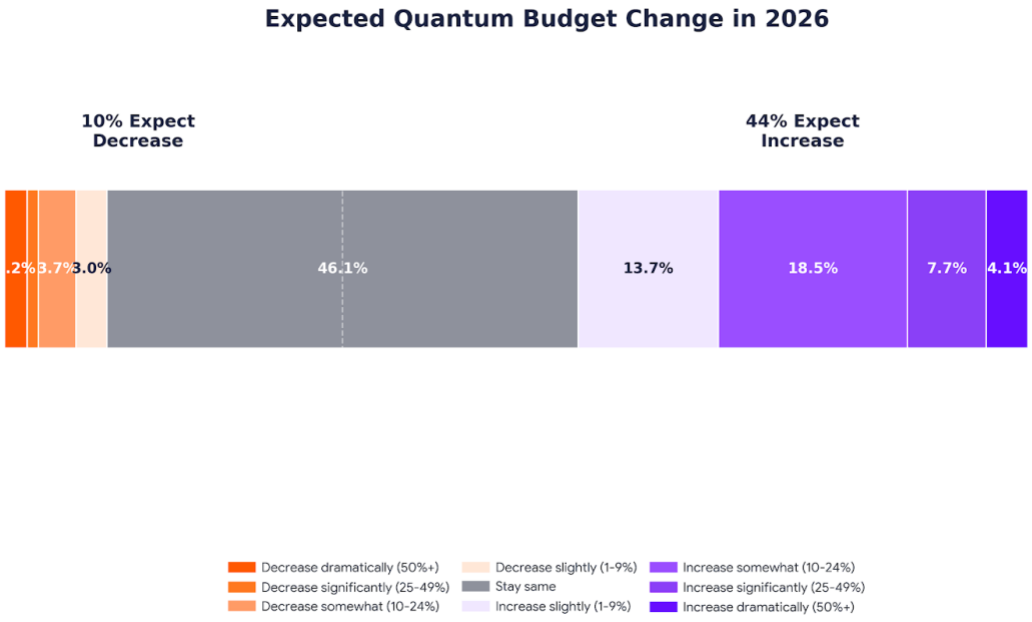
Q16: 2026 Budget Expectations

How do you expect your organization's quantum computing budget to change in 2026 compared to 2025?

Budget Direction	Count	Percentage
Increase dramatically (>50%)	11	4.1%
Increase significantly (25-49%)	21	7.7%
Increase somewhat (10-24%)	50	18.5%
Increase slightly (1-9%)	37	13.7%
Stay about the same	125	46.1%
Decrease (any amount)	27	10.0%

44% expect budget increases in 2026, with only 10% anticipating decreases. The 46% expecting stability suggests a consolidation phase rather than expansion or contraction.

Null Finding: Budget and Timeline Are Decoupled
Contrary to intuition, there is no significant correlation between budget expectations (Q16) and timeline beliefs (Q8). Organizations spending more do not expect quantum advantage sooner; they are spending to *enable* it, acknowledging the long road ahead. This suggests budget decisions are driven by strategic positioning rather than short-term timing beliefs.



Q17: Primary Budget Driver for Increase

What is the primary driver for your quantum budget increase (if applicable)?

Driver	Count	Percentage
Government mandates/grant availability	75	28.2%
Competitive pressure/FOMO	43	16.2%
Successful internal pilot results	25	9.4%
Classical simulation limits	22	8.3%
Not applicable	101	38.0%

Government mandates/grants are the leading budget driver (28%), highlighting the continued importance of public funding in quantum ecosystem development.

Budget Signals: Consolidation, Not Contraction

The budget outlook reveals a market in consolidation rather than expansion:

- **46% flat + 10% decrease = 56% not growing.** This is a "hold" signal, not a "buy" signal. The FOMO-driven investment phase has ended.
- **Government as risk underwriter:** The 28% citing government mandates/grants as primary driver highlights that public funding remains essential. Private capital increasingly demands proof points that the technology cannot yet provide.
- **The 8% citing "classical simulation limits" as budget driver aligns with the 62% experiencing computational constraints (Q9).** These respondents have identified specific use cases where quantum value is demonstrable—they are the early commercial market.
- **Only 9% cite successful pilot results as driver.** This confirms the industry remains pre-commercial: pilots are producing learning, not revenue.

Budget Driver Evolution: From FOMO to Necessity

The correlation between maturity stage and budget driver (χ^2=33.5, V=0.32, p=0.018) reveals a telling pattern:

Maturity Stage	Primary Budget Driver
Exploring/No Plans	Competitive pressure/FOMO (26%)
PoC/Pilot	Government mandates/grants (34%)
Production/Scaling	Classical simulation limits (22%)

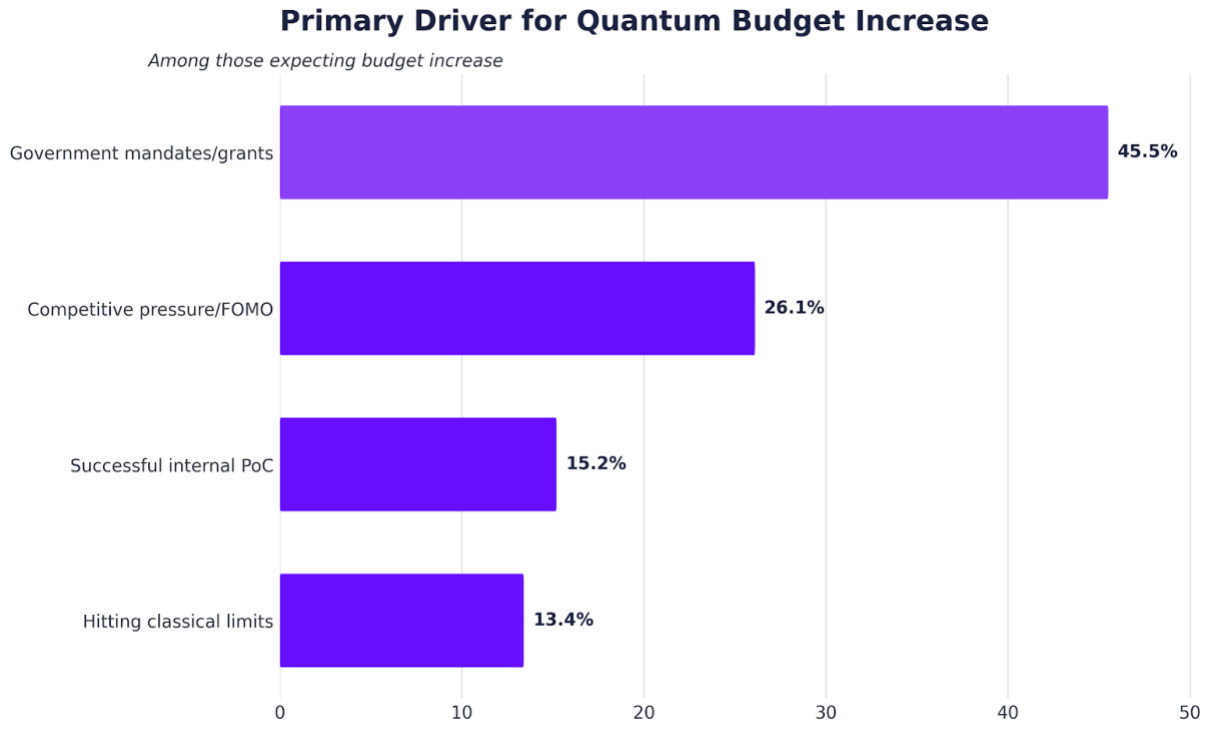
Early-stage organizations are still driven by fear of missing out. Advanced organizations cite hitting the "classical wall" as their driver—they have identified specific problems where quantum value is

demonstrable. This evolution from FOMO to necessity represents the maturation of the market from hype-driven to problem-driven investment.

The "C-Suite Reality Check"

A notable correlation emerges between role level and budget expectations (ρ=-0.29, p=0.002): **senior executives are significantly *less* bullish on dramatic budget increases than junior researchers and individual contributors.** This "executive pessimism"—or more charitably, "executive realism"—suggests that those closest to capital allocation decisions are waiting for proof points before releasing the next tranche of investment. The pattern aligns with the 43% viewing commercialization as behind expectations (Q10) and reinforces that the FOMO-driven spending phase has ended.

For technology providers, this means sales cycles now run through procurement rigor, not executive enthusiasm. Business cases must demonstrate measurable returns, not theoretical potential.



Section 5: Market Outlook & Sourcing & Sovereignty

The fragmentation of the global quantum supply chain is the defining market reality of 2026. What follows examines how organizations are navigating procurement in an environment where technical capability must be weighed against geopolitical considerations.

Q21: Sourcing Approach

How does your organization approach sourcing quantum technology?

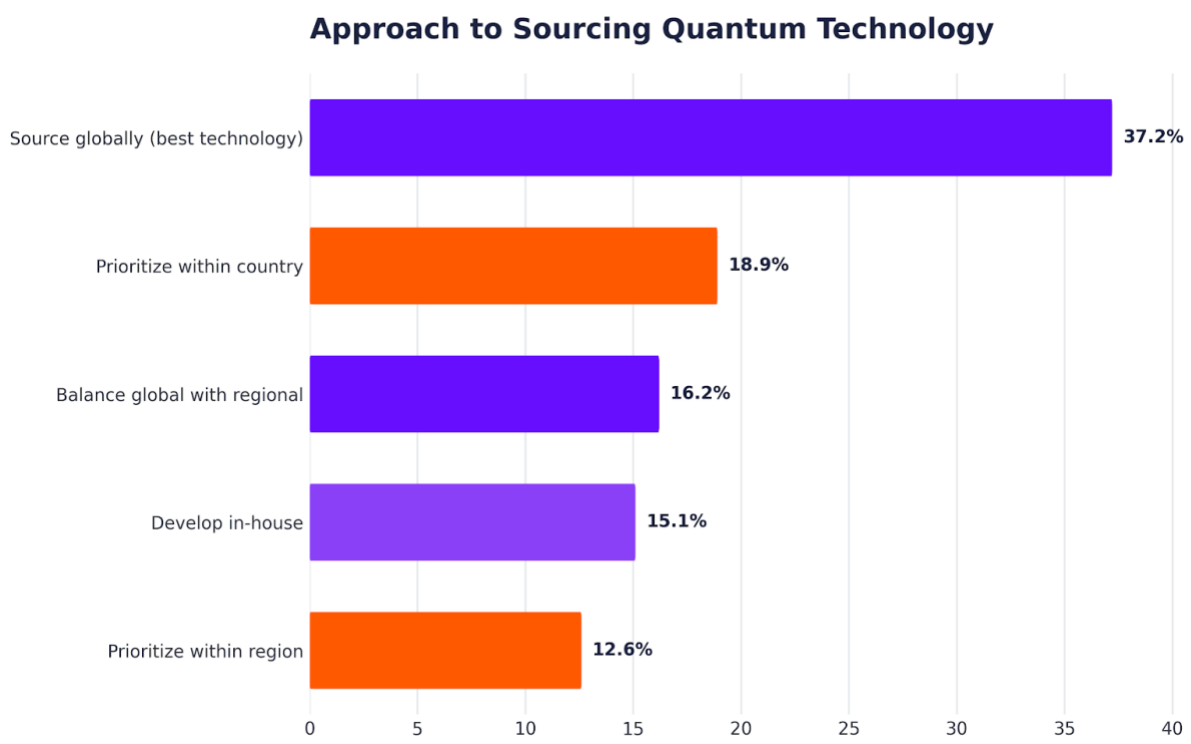
Approach	Count	Percentage
Source globally based on best technology	71	26.8%
Prioritize providers within our country	36	13.6%
Balance global access with regional preferences	31	11.7%
Primarily develop in-house	29	10.9%
Prioritize providers within our region	24	9.1%
Don't know/Not applicable	74	27.9%

Strategy Maturity and Sourcing Posture

Organizations with formal, funded quantum strategies source differently than those without (V=0.299, p=0.001):

Strategy Status	"Source Globally"	"Develop In-House"	"Balance"
Funded roadmap	38.9%	19.4%	8.3%
In progress	21.7%	8.3%	16.7%
No roadmap	18.9%	5.4%	13.5%

Organizations with funded roadmaps over-index on both extremes: global best-technology sourcing *and* in-house development. This reflects capability and commitment—these organizations have the resources to either buy the best or build their own. Organizations without roadmaps cluster in "balancing" behavior, hedging their bets while remaining uncommitted.



Q22: Digital Sovereignty Importance

How important is digital or technological sovereignty when selecting quantum technology?

Position	Count	Percentage
Balance sovereignty with technology quality	122	46.0%
No strong preference	51	19.2%
Strongly prioritize sovereignty	42	15.8%
Prioritize best technology regardless of location	37	14.0%
Sovereignty is not a factor	13	4.9%

The dominant position (46%) is balancing sovereignty with technology quality. Only 16% strongly prioritize sovereignty. However, the 46% "balancing" represents active navigation of competing priorities—not indifference. Combined with the 16% who strongly prioritize sovereignty, **62% of respondents actively factor sovereignty into procurement decisions.**

The Death of the Purely Global Market

The 4.9% for whom "Sovereignty is not a factor" is strikingly low. This statistic effectively signals the end of the purely globalized market model that characterized the industry's early years. Organizations are essentially hedging: maintaining access to leading global technology for R&D while cultivating domestic or allied alternatives for sensitive workloads.

Regional Sourcing Patterns

Approach	% of Respondents	Strategic Implication
Source globally (best technology)	26.8%	Performance-first, typically U.S.-based orgs
Prioritize in-country providers	13.6%	Strong sovereignty mandate
Balance global/regional	11.7%	Hedging strategy
Prioritize regional providers	9.1%	EU-style sovereignty focus
Develop in-house	10.9%	Capability building, often defense/national labs

Sovereignty and Security Linkage

The sovereignty preference (Q22) connects directly to the 17% conducting cryptography/security research (Q12). Organizations concerned about post-quantum cryptography threats recognize that relying on a foreign adversary's hardware—or even a neutral third party's cloud—for sensitive computations creates unacceptable risk. This drives the 14% prioritizing "On-premises deployment options" (Q20).

The "Harvest Now, Decrypt Later" threat—adversaries collecting encrypted data today for future quantum decryption—is accelerating PQC migration timelines. NIST's finalization of post-quantum cryptography standards (ML-KEM/Kyber, ML-DSA/Dilithium) creates compliance pressure that intersects with quantum computing procurement decisions.

Regional Sovereignty Divergence: Statistical Confirmation

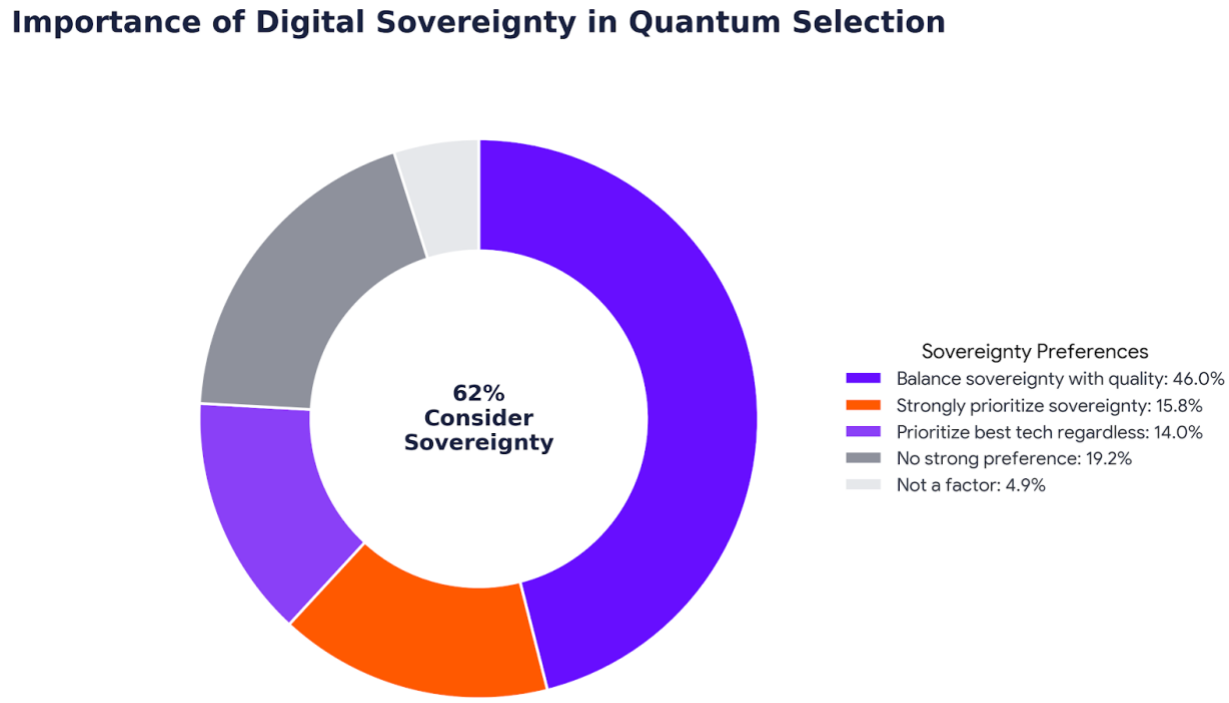
The strongest categorical correlation in the dataset confirms the regional sovereignty divide (χ^2=48.2, V=0.41, p<0.001):

Region	"Source Globally (Best Tech)"	"Strongly Prioritize Sovereignty"
United States	34.7%	8.4%
European Union	17.1%	24.4%
Japan	22.7%	13.6%

The effect size (Cramér's V=0.41) indicates a strong association—regional origin is a primary determinant of sovereignty posture. US respondents favor performance-first sourcing; EU respondents prioritize technological autonomy even at capability cost.

Statistical analysis confirms that security-focused respondents (those doing cryptography/security research in Q12) are not significantly more likely to prioritize sovereignty (Q22). Sovereignty appears driven by supply chain resilience and policy compliance rather than direct security concerns—explaining why it operates as a procurement filter across all sectors, not just security-sensitive ones.

Strategic Implication: A single global go-to-market strategy will systematically underperform. Regional teams must lead with different value propositions: capability leadership in North America; sovereignty credentials and data residency guarantees in Europe.



Q23: Expected Commercialization Driver Segment

Which customer segment is most likely to drive quantum computing commercialization in the next 3 years

Segment	Count	Percentage
Government and defense	64	24.2%
Large enterprises (Fortune 500/Global 2000)	52	19.6%
Pharmaceutical and life sciences	28	10.6%
Research institutions moving to commercial	23	8.7%
Startups and scale-ups	23	8.7%
Technology companies and cloud providers	21	7.9%
Energy and materials	21	7.9%
No segment ready for commercial adoption	20	7.5%
Financial services	13	4.9%

Government/defense leads expected commercialization (24%), followed by large enterprises (20%) and pharma/life sciences (11%). Financial services ranks lower than often assumed (5%).

Sector Analysis: Where Commercial Traction Emerges

The sector distribution reveals where real money will flow:

Government/Defense (24%) - The Anchor Tenant

Defense applications—logistics optimization, signals intelligence, cryptanalysis—are less sensitive to immediate ROI than commercial applications. Government can afford to invest in capability development before commercial viability is proven. The 28% citing government mandates/grants as budget driver (Q17) confirms that public funding underwrites ecosystem risk.

Large Enterprises (20%) - The Long Game

Within this cohort, the survey data points to Pharma/Life Sciences (11%) and Energy/Materials (8%) as the likely first movers. These sectors face the "classical wall" most acutely—molecular simulation and materials design are quantum-native problems.

Finance (5%) - The Trough of Disillusionment

The last-place ranking contradicts early hype that promised quantum speedups for portfolio optimization and arbitrage. The reality:

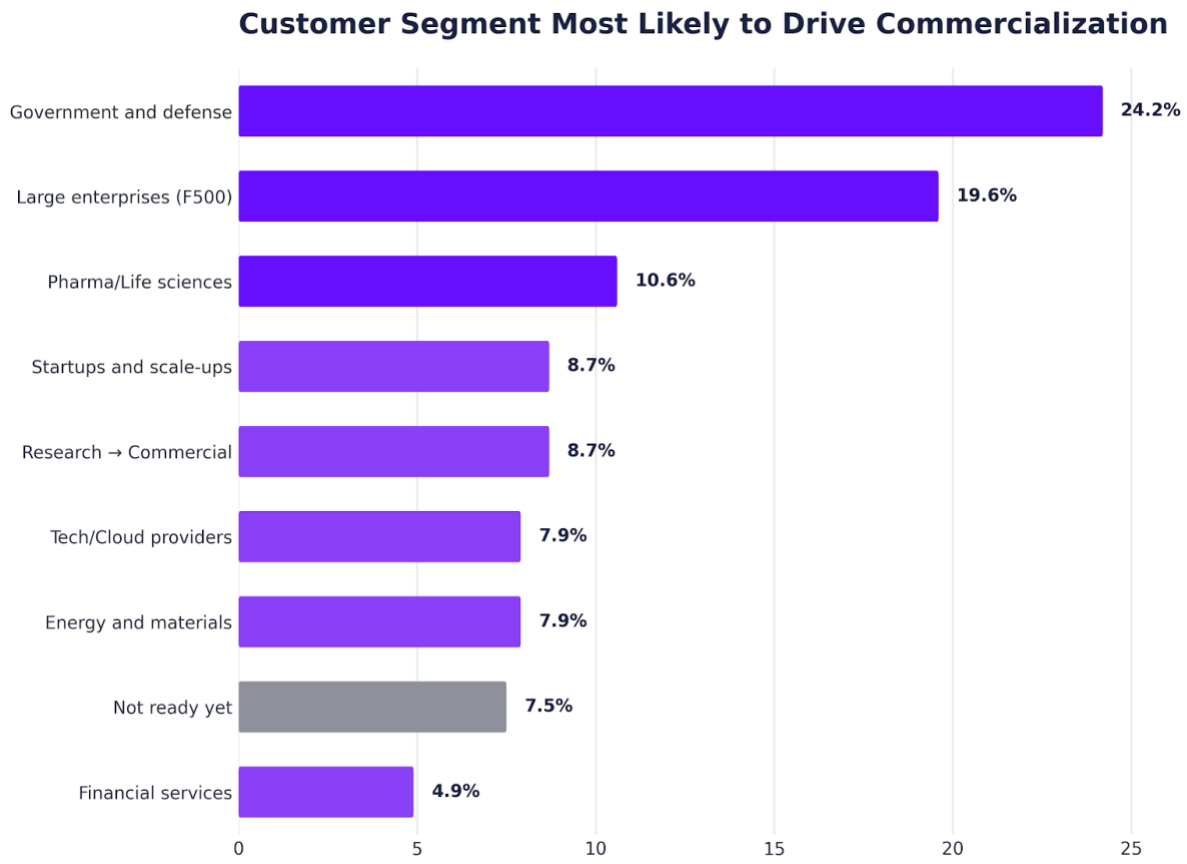
- Financial problems require massive data loading (I/O bottlenecks)
- Quadratic speedups from algorithms like Grover's are insufficient to justify cost versus classical heuristics
- The sector appears to be waiting for full fault tolerance before re-engaging

Technology/Cloud (8%) - Infrastructure Plays

This segment likely represents vendors and infrastructure providers rather than end-user commercial applications.

The "Not Ready" Signal

The 8% selecting "No segment ready for commercial adoption" deserves attention. This cohort—combined with the 43% viewing commercialization as behind expectations (Q10)—represents informed skepticism that should temper investment enthusiasm.



The Sovereignty Dimension by Region

The sovereignty posture varies predictably by region:

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

This stratification creates distinct market requirements for technology providers—a single global go-to-market strategy will underperform region-specific approaches.

Limitations

- Self-selection bias: Survey participants are inherently more engaged with quantum computing than the broader market.
- Academic over-representation: 48% academic composition may skew perceptions toward research-oriented perspectives.
- Country sample sizes: Country-level analysis for smaller cohorts (n<20) should be treated as directional rather than definitive.
- Point-in-time snapshot: Budget expectations and sovereignty postures may shift rapidly with policy changes or technology breakthroughs.
- External context integration: This report incorporates industry context from sources external to the survey to aid interpretation. These external claims, including workforce statistics and policy details, should be independently verified and may evolve rapidly.

What Comes Next

This report represents the second installment in a three-part analysis of the 2026 Quantum Readiness Survey. Part 2 has examined how organizations are translating their quantum ambitions into investment decisions, procurement strategies, and sourcing postures, revealing a market in consolidation rather than expansion, where sovereignty has emerged as a defining procurement filter.

Part 3 will complete the series by examining technology, talent, and roadmap expectations. It will cover modality preferences (Q18), the quantum error correction imperative (Q19), technology selection criteria (Q20), and the open-ended breakthrough analysis (Q24). Together with Part 1's market reality check and Part 2's investment lens, Part 3 will provide the technology dimension: which platforms, capabilities, and milestones the market believes will determine leadership in the fault-tolerant era.

Appendix: Survey Instrument Summary

Question	Type	Valid n
Q14: Adoption Challenges	Multi-select (12 options)	274
Q15: QC Strategy	Single-select	271
Q16: Budget Change 2026	Single-select	271
Q17: Budget Driver	Single-select	266
Q21: Sourcing Approach	Single-select	265
Q22: Sovereignty Importance	Single-select	265
Q23: Driver Segment	Single-select	265

About QuEra

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