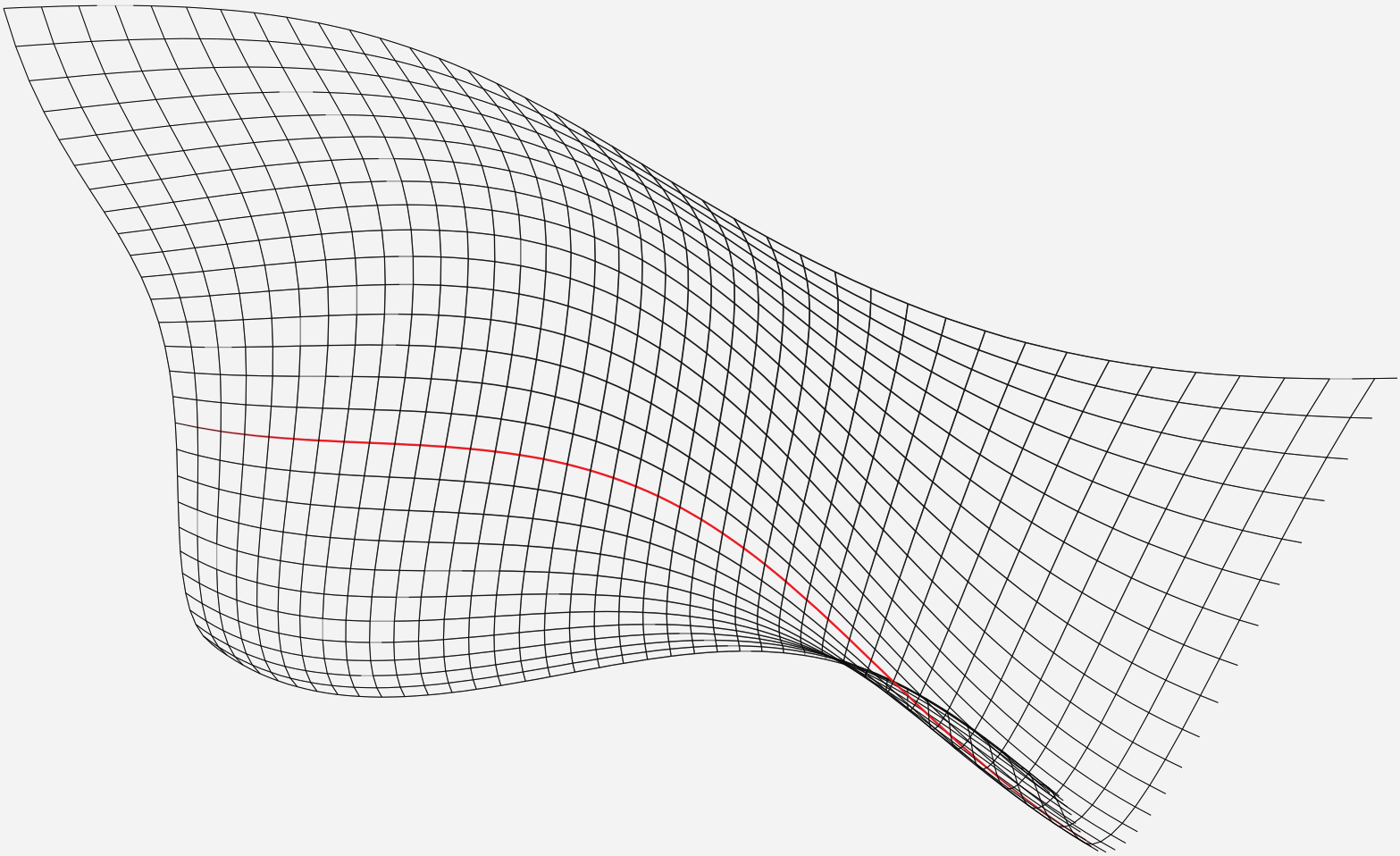


5 | Policy

Our 2025 report examined the broader policy landscape across a selection of countries. This year's report focuses more specifically on policy developments that have emerged in the last two years. This enables a more systematic assessment of recent developments, and complements our previous analysis by examining changes in policy direction, newly introduced measures, and emerging trends that may have implications for future policy direction.

5.1 | Overview of national quantum policy efforts, 2024–2026

MAY 2024

🇸🇬

Singapore

Singapore launched its national quantum strategy, which commits nearly S$300 million to quantum research, engineering, commercialization and talent development. Measures include quantum processors, sensing, communications/security, scholarships and strengthening the national quantum ecosystem.[1]

AUG 2024

🇷🇴

Romania

Romania launched its national quantum strategy, which establishes a national framework and quantum ecosystem connecting research institutions, government and industry, with emphasis on research, technological applications, skills and participation in European quantum initiatives.[2]

APR 2025

🇪🇸

Spain

Spain launched its national quantum strategy backed by €808 million in public investment. It focuses on quantum computing, communications and sensing; R&D and technology transfer; development of quantum companies; talent; infrastructure; and preparation for post-quantum cybersecurity.[3]

APR 2025

🇫🇮

Finland

Finland launched its national quantum strategy containing eight measures covering R&D, education and talent, quantum-computing infrastructure, quantum-secure communications, commercialization, private investment, international cooperation and integration with AI/HPC.[4]

JUL 2025

🇮🇹

Italy

Italy announced its national quantum strategy for establishing a national framework for research, industrial applications, skills and national security. It seeks to create an integrated quantum ecosystem, strengthen technological sovereignty and competitiveness, attract capital and talent, and protect critical infrastructure.[5]

DEC 2025

Czech Republic

Czech Republic's national quantum strategy aims to create a national quantum ecosystem covering computing and simulation, communications, sensing, metrology and materials. Strategic pillars include R&D, education, competitiveness, international cooperation, security/defense and quantum infrastructure.[6]

DEC 2025

Chile

Chile announced its national quantum strategy including a ten-year roadmap covering quantum computing, advanced sensing, secure communications, materials simulation and cybersecurity. Priorities include human capital, scientific infrastructure, industrial development, governance and technological sovereignty.[7]

MAR 2026

United Kingdom

The UK announced a major expansion of the 2023 National Quantum Strategy with new support worth up to £2 billion spanning research, skills, procurement and deployment. A central element is a world-first procurement commitment of up to £1 billion for commercial-scale quantum computers, with an ambition to make and deploy quantum computers at scale in the early 2030s.[8]

JUN 2026

United States

The Executive Order (EO) 'Ushering in the Next Frontier of Quantum Innovation' brought a significant update to the U.S. National Quantum Strategy. The new strategy gives greater weight to commercialization, deployment, industry partnerships and quantum-enabling technologies. The EO also creates the QC-ADDS initiative for a discovery-scale quantum computer, requires plans for sensing, networking and supply chains, strengthens quantum security and international cooperation, and establishes a government-wide quantum workforce strategy.[9]

5.2 | United States

The United States continues to develop its quantum technology policy through the National Quantum Initiative (NQI), established in 2018 as a coordinated federal program.[10] In 2025 and 2026, U.S. policy moved toward deployment, commercialization, manufacturing and sovereign technological capability.

This shift was formalized in June 2026 with the Executive Order 'Ushering in the Next Frontier of Quantum Innovation' which underlined an updated National Quantum Strategy focused on commercial deployment, quantum-enabling technologies and stronger partnerships with U.S. industry.[11]

Federal investment in the domestic quantum ecosystem has simultaneously expanded. In November 2025, the Department of Energy (DOE) announced $625 million to renew its five National Quantum Information Science Research Centers for up to five years. These centers support quantum computing, sensing, networking, materials, workforce development and partnerships with industry, while seeking to accelerate technologies toward practical applications.[12] In 2026, the DOE also advanced domestic production capabilities, in line with the Genesis Mission's goals, for high-purity silicon and germanium materials important to quantum devices, reflecting greater policy attention to quantum supply-chain resilience.[13]

$625M

In November 2025, the Department of Energy announced $625 million to renew its five National Quantum Information Science Research Centers for up to five years.

Commercialization and government adoption became particularly prominent under the 2026 Executive Order. It established the Quantum Computer for Application Development and Discovery Science effort to pursue a quantum computer capable of economically significant scientific applications, including through private-sector partnerships and potentially advance market commitments. In June 2026, NIST announced a $20 million investment in establishing the Quantum Manufacturing Engineering Center (QMEC) to accelerate manufacturing of scalable, high-performance quantum components and systems to drive significant growth in the U.S. quantum industry.[14]

International cooperation has also broadened. In 2025, the United States concluded Technology Prosperity Deals with the United Kingdom[15], Japan and South Korea that include cooperation on quantum technologies, research and innovation.[16] The 2026 Executive Order further calls for trusted international supply chains, improved market access for U.S. quantum companies and closer coordination with allies on technology protection.

5.3 | Australia

Australia continues to implement its National Quantum Strategy, released in May 2023, which aims to position the country as a global leader in quantum technologies by 2030. The strategy remains organized around five themes covering research and development, infrastructure and materials, skills, standards and regulatory frameworks, and a trusted and inclusive quantum ecosystem.[17] In 2025 and 2026, Australian policy moved toward commercialization, domestic scale-up and deployment.

The Department of Industry's 2025–29 Corporate Plan confirms continued implementation through government investments in PsiQuantum, Silicon Quantum Computing and the establishment of Quantum Australia, the national center for quantum industry growth.[18] In August 2026, Quantum Australia announced that its national programs have created $83.1M in economic value and that it has played an active role in establishing 15 new quantum companies.[19]

Commercialization has become a particularly important priority. The Critical Technologies Challenge Program is designed to connect quantum researchers, companies and end-users, demonstrate Australian capabilities and reduce barriers to adoption. In February 2026, the program provided $12.7 million for quantum projects in areas including mining, healthcare and data-center optimization[20], as part of the broader $35.9 million program.[21]

Quantum technologies are also becoming more closely connected with defense innovation. Under AUKUS Pillar II, four Australian-developed quantum optical atomic clocks were successfully trialed in the United States in 2025, demonstrating progress toward integrating Australian quantum technologies into allied defense capabilities.[22]

Regarding further cooperation with international partners, in July 2026, Australia and Japan signed a dedicated quantum cooperation memorandum covering research, commercialization, investment, workforce development and supply-chain resilience.[23]

5.4 | Canada

Canada continues to implement its National Quantum Strategy (NQS), launched in 2023 with $360 million in dedicated funding over seven years. The strategy remains organized around three interrelated pillars: research, talent and commercialization.[24] In 2025 and 2026, Canadian policy showed more focus on scaling domestic companies, accelerating technology adoption and linking quantum capabilities with industrial and defense policy.

The most significant development came through Budget 2025, which committed an additional $334.3 million through the Defence Industrial Strategy to strengthen Canada's quantum ecosystem.[25] Building on this initiative, in December 2025, the government launched Phase 1 of the Canadian Quantum Champions Program, providing up to $92 million to Anyon Systems, Nord Quantique, Photonic and Xanadu Quantum Technologies, with up to $23 million available to each company, aiming to anchor leading Canadian quantum companies and talent domestically and to accelerate development of fault-tolerant quantum computers that demonstrate industrial application.[26]

Quantum technologies also became more closely integrated with defense-industrial policy. Canada's 2026 Defence Industrial Strategy, which establishes mechanisms to accelerate domestic R&D, procurement and commercialization, identifies quantum as a frontier and sovereign-capability technology.[27] In August 2026, Canada launched its first Quantum Defence Innovation Secure Hub in Calgary, backed by $20.3 million over two years, to develop and test technologies including quantum sensing, navigation, algorithms and hardware assurance for defense applications.[28]

International cooperation has simultaneously expanded.

During Canada's 2025 G7 Presidency, G7 leaders adopted the Kananaskis Common Vision for the Future of Quantum Technologies, strengthening cooperation on quantum innovation.[29] Canada subsequently agreed with Germany[30] to support joint commercialization projects in quantum computing and sensing, and in May 2026 signed a quantum science and technology cooperation statement with France covering R&D, talent, market development and resilient supply chains.[31]

5.5 | United Kingdom

The United Kingdom continues to implement its National Quantum Strategy, published in March 2023, which sets out a ten-year vision for the UK to become a leading quantum-enabled economy, backed by £2.5 billion of public investment.[32] In 2025 and 2026, UK quantum policy moved toward a focus on commercialization, scale-up, procurement and deployment.

£2B

▶ In March 2026, the UK announced a major expansion of its National Quantum Strategy with new support worth up to £2 billion.

Commercialization became a major priority through the UK's Modern Industrial Strategy[33]. In June 2025, the government committed £670 million to accelerate quantum computing applications and provided the National Quantum Computing Centre with a long-term funding settlement.[34] This was followed in March 2026 by a package worth up to £2 billion for quantum technology, including more than £500 million for quantum computing, over £400 million for sensing and navigation, additional infrastructure and skills funding, and approximately £1 billion for procurement of large-scale quantum computers.[35]

International cooperation has simultaneously expanded.

The 2025 UK–U.S. Technology Prosperity Deal includes quantum technologies among its strategic areas of cooperation.[36] The UK also expanded bilateral quantum cooperation with Germany in 2025 and hosted the Quantum Development Group in 2026, where members prioritized investment, supply-chain resilience, standards and commercialization.[37][38]

5.6 | The Netherlands

The Netherlands continues to develop its quantum technology ecosystem through Quantum Delta NL (QDNL), a National Growth Fund program focused on establishing the country as an internationally leading center for quantum research, technology development and commercialization. The program is structured around quantum computing and simulation, quantum networking and quantum sensing, supported by activities in research and innovation, ecosystem development, human capital and societal impact. In March 2025, the Dutch government approved a revised programming of Quantum Delta NL, concentrating resources on core activities and strengthening its governance structure.[39] In recent years, commercialization and company scale-up have become important priorities for the Netherlands.

In 2025, the Invest-NL Deep Tech Fund invested €5 million in QuiX Quantum as part of a €15 million financing round to support development of a full-stack photonic quantum computer.[40] In May 2026, Invest-NL provided a further €19.5 million to QuantWare within a €152 million funding round to expand quantum-processor production in the Netherlands.[41] This was reinforced in June 2026 when the Deep Tech Fund was expanded to €610 million, with quantum technology explicitly identified among its target strategic technologies.[42]

Sovereign technological capability also gained greater prominence in 2026. The new coalition agreement commits the Netherlands to public-private investment in quantum and other key technologies, with an emphasis on scalability, productivity and adoption in critical sectors, and explicitly states the ambition to build a quantum computer in the Netherlands.[43]

International cooperation has also expanded.

In May 2025, Quantum Delta NL and Japan's AIST agreed to deepen long-term cooperation in quantum technology and develop an international quantum innovation ecosystem.[44] In 2026, the Netherlands and India also included quantum technologies within their broader Strategic Partnership Roadmap.[45]

5.7 | China

China continues to pursue quantum technology through a strongly state-directed science and industrial policy framework. The 14th Five-Year Plan identified quantum information as a frontier field for national laboratory development and called for accelerated progress in quantum computing and quantum communications.[46] In 2025, quantum technology received greater industrial-policy prominence when the Government Work Report formally identified it as an "industry of the future" and called for a mechanism to increase funding for future industries alongside demonstration and large-scale application initiatives.[47]

This approach was reinforced as China entered its 15th Five-Year Plan period. The 2026 Government Work Report again lists quantum technology among future industries and calls for funding and risk-sharing mechanisms, greater use of government investment funds as "patient capital," and support for technology-focused SMEs and unicorn companies.[48]

Commercialization and company scale-up are also receiving more attention. In December 2025, China formally launched its National Venture Capital Guidance Fund, designed as a long-term financing mechanism for strategically important technologies, including quantum technology.[49]

Sovereign technological capability remains central to the strategy. In March 2025, Chinese researchers unveiled the Zuchongzhi 3.0 superconducting quantum-computing prototype[50], while Hefei has continued developing a concentrated industrial cluster encompassing quantum computing, communications and measurement companies.[51]

Internationally, China combines technological self-reliance with selective openness. In 2026, Premier Li Qiang highlighted that Chinese large-scale scientific facilities in areas including quantum technology remain open to international users.[52]

5.8 | Ireland

Ireland continues to implement Quantum 2030: A National Quantum Technologies Strategy for Ireland, launched in 2023, to establish the country as an internationally competitive hub for quantum technologies by 2030. The strategy is organized around five pillars covering research, talent, national and international collaboration, innovation and entrepreneurship, and public awareness.[53] In 2025 and 2026, Irish policy moved toward building research infrastructure, supporting commercial applications and creating a more concentrated national quantum ecosystem.

Commercialization became more prominent through the Disruptive Technologies Innovation Fund (DTIF). In 2025, the QUBIC project received €13.7 million to bring together Irish companies, multinationals and research organizations to develop quantum algorithms, hardware and software for applications in energy, climate modeling, advanced materials and pharmaceuticals.[54] The project illustrates Ireland's increasing emphasis on translating quantum research into commercially relevant applications and strengthening industry–research collaboration.

Domestic research capability also expanded substantially in 2026. The government announced €460 million for seven new Research Ireland centers, including Rinn Quantum, a dedicated national center for quantum information science and technology intended to bridge fundamental research and real-world applications, develop industry partnerships and strengthen the quantum workforce.[55] This follows the 2026 Digital and AI Strategy commitment to establish a Quantum Centre of Excellence.[56] In 2026, the government also approved a €100 million expansion of the Tyndall National Institute to strengthen capabilities in semiconductors, photonics, quantum technologies and next-generation computing.[57]

Regarding international cooperation, Ireland signed the European Quantum Pact in June 2025, committing to closer EU cooperation on research, infrastructure, investment, skills and the development of a competitive European quantum ecosystem.[58]

5.9 | India

India continues to implement its National Quantum Mission (NQM), approved in 2023 with an outlay of ₹6,003.65 crore through 2030–31. The mission aims to build a domestic quantum ecosystem spanning computing, communications, sensing and metrology, and quantum materials, including the development of intermediate-scale quantum computers.[59] In 2025 and 2026, Indian policy moved toward infrastructure construction, technology translation, startup development and domestic hardware capability.

The mission's institutional structure became fully operational during 2025. Four Thematic Hubs were established at IISc Bengaluru for quantum computing, IIT Madras with C-DOT for quantum communications, IIT Bombay for quantum sensing and metrology, and IIT Delhi for quantum materials and devices. Together, these activities involve researchers across dozens of Indian institutions and combine R&D with entrepreneurship, workforce development and industry collaboration.[60]

Commercialization and domestic company development have simultaneously become more prominent. NQM introduced dedicated startup-support guidelines providing funding, infrastructure access and mentorship, with eight quantum startups supported by early 2026.[61] In April 2025, NQM-supported QpiAI[62] launched QpiAI-Indus, a 25-superconducting-qubit full-stack quantum-computing system; the government subsequently reported further development of a 64-qubit quantum processor.

International cooperation has become more structured. In April 2025, India released its first International Technology Engagement Strategy for Quantum, aimed at guiding partnerships, commercialization, supply-chain engagement and participation in international standards.[63] In 2026, India deepened cooperation with Japan on quantum hardware, research and industrial deployment[64] and launched a U.S.–India funding call[65] supporting joint quantum technology projects with commercial potential.

5.10 | Germany

Germany continues to develop its quantum technology ecosystem through the Federal Government's Action Concept for Quantum Technologies, which coordinates federal activities for 2023–2026 and mobilizes approximately €3 billion from the government and research organizations. The framework focuses on quantum computing, sensing, communications, enabling technologies, technology transfer and the development of a competitive domestic ecosystem.[66] In 2025 and 2026, German policy moved toward commercialization, technological sovereignty and translating its strong research base into industrial capabilities.

This was reinforced through the High-Tech Agenda Germany, adopted in July 2025, which identifies quantum technologies as one of six strategic technologies.[67] The agenda emphasizes faster transfer from research into industry, public-private partnerships, improved conditions for startups and a stronger role for the state as an anchor customer. In May 2026, the government presented dedicated roadmaps for the six technologies, further institutionalizing quantum as a long-term industrial-policy priority.[68]

At the same time, domestic quantum-computing capability has expanded. The DLR Quantum Computing Initiative encompasses 17 hardware projects, more than 60 use cases and over 100 partners, providing companies and researchers with access to German quantum systems and supporting industrial applications.[69] In March 2026, the government-backed SQale project was launched with €18.4 million in federal funding to develop a modular ion-trap quantum computer with more than 200 interconnected qubits, with a longer-term objective of establishing internationally competitive quantum-computing capacity in Germany.[70]

International cooperation has also broadened. Germany and the United Kingdom announced a £6 million joint quantum R&D program[71] in December 2025, accompanied by cooperation on quantum standards. In July 2026, Germany and France agreed to strengthen bilateral quantum cooperation and signed common positions regarding the planned EU Quantum Act.[72]

5.11 | France

France continues to implement its National Quantum Strategy, launched in 2021 to establish the country among the leading global powers in quantum technologies. The original strategy combined more than €1 billion in public funding with an overall public-private commitment of approximately €1.8 billion, supporting quantum computing, sensing, communications, enabling technologies, research and talent development.[73] In 2025 and 2026, French policy moved toward industrialization, domestic scale-up, sovereign computing capability and the creation of European quantum champions.

In May 2026, the government announced additional funding through the France 2030 plan for the 2026–2030 period. The updated strategy brings the public funding commitment to approximately €1.7 billion and the overall public-private commitment to more than €3 billion by 2030.[74]

Commercial scale-up has also received direct state support; in January 2025, the Defense Innovation Fund participated in a €100 million financing round for Alice & Bob, supporting development of its quantum-computing technology.[75]

Achieving sovereign computing capability has also been prioritized. France's PROQCIMA program uses long-term public procurement to support five French quantum-computing companies: Alice & Bob, C12, Pasqal, Quandela and Quobly.[76] In 2026, the government doubled planned defense and security procurement funding for the program's 2026–2030 phases and raised its 2032 objective from 128 to 1,024 logical qubits. Public procurement and equity investment are intended to accelerate industrialization and mobilize additional private capital.[77]

Regarding international cooperation, in May 2026, France and Canada signed a dedicated quantum cooperation statement covering joint R&D, talent, knowledge exchange, market development and resilient supply chains.[78] France is also advocating together with Germany for European pooled procurement, aligned technology roadmaps and quantum-chip pilot lines under the forthcoming EU Quantum Act.[79]

5.12 | South Korea

South Korea continues to develop its quantum ecosystem through the Quantum Science and Technology Strategy and the Quantum Technology and Industry Act, which established a statutory framework for coordinated government support, commercialization, research infrastructure, talent and international cooperation.[80] In January 2026, this framework was substantially strengthened through Korea's first Comprehensive Plan for Fostering Quantum Science and Technology and the Quantum Industry, which sets objectives to become a world-leading quantum-chip manufacturing country, cultivate 10,000 quantum professionals and develop 2,000 quantum-related companies by 2035.[81]

Commercialization became a further priority in 2025. The Ministry of Science and ICT (MSIT) allocated KRW 198 billion to quantum science and technology, a 54% increase from 2024, supporting 24 projects covering computing, components, measurement, international research and industrial infrastructure.[82] A new Quantum Computing Service and Utilization Infrastructure program was also established to install verified quantum computers domestically and provide access to research organizations and companies. The 2026 budget further increased the proposed Quantum Flagship quantum-computing program from KRW 9.8 billion in 2025 to KRW 50 billion, reinforcing Korea's move toward large-scale mission-oriented development.[83]

Sovereign technological capability is also a focus of the new policy. The 2026 Comprehensive Plan calls for a domestically developed full-stack "K-Quantum Computer", hybrid infrastructure combining quantum computing, HPC and AI, and quantum clusters specializing in computing, sensors, algorithms and enabling components. The government also launched a Quantum Technology Council involving Samsung Electronics, LG Electronics, SKT, KT, Hanwha, LIG Nex1 and other major companies to accelerate industrial adoption.[84] By mid-2026, the government was targeting a domestically developed 50-qubit computer during 2026 and a 100-qubit error-correcting system by 2029.[85]

International cooperation has expanded. The 2025 U.S.–Korea Technology Prosperity Deal provides for cooperation on quantum institutions, standards and supply-chain resilience.[86] Korea also participated in the Quantum Development Group in 2026.[87]

5.13 | Japan

Japan continues to develop its quantum ecosystem through a layered policy framework comprising the Quantum Technology and Innovation Strategy, the Vision of Quantum Future Society, and the Strategy of Quantum Future Industry Development. The latter established objectives to be achieved by 2030, including 10 million quantum-technology users, quantum-enabled production worth ¥50 trillion and the creation of quantum unicorn companies.[88]

Commercialization and industrial scale-up received substantially greater support in late 2025 and 2026. The government's economic package called for accelerated development of domestic quantum computers, expansion of Quantum Technology Innovation Hubs, use-case creation and stronger testbed infrastructure at AIST's G-QuAT, RIKEN and other national institutes.[89] In 2026, the Ministry of Economy, Trade and Industry confirmed that approximately ¥100 billion had been secured in the supplementary budget to accelerate next-generation quantum-computer development and establish a globally competitive Japanese industry.[90]

Sovereign technological capability has advanced. In April 2025, RIKEN and Fujitsu unveiled a 256-qubit superconducting quantum computer, significantly expanding Japan's domestic computing capability.[91] In 2026, AIST expanded its ABCI-Q quantum–classical infrastructure and installed MoQuren, a Japan-developed optical quantum computer intended for future commercialization.[92]

International cooperation has also broadened.

Japan and the EU signed a quantum cooperation arrangement in May 2025 covering joint research, infrastructure, education and industrialization.[93] This produced the first joint Japan–EU quantum project, Q-NEKO, launched in 2026.[94] Japan also concluded new cooperation arrangements with Singapore and India in 2026, including collaboration on research, industrial applications, commercialization and talent.[95]

Cooperation with the United States is a well-resourced strand of Japan's external quantum strategy. The U.S.–Japan Technology Prosperity Deal[96], signed in October 2025, makes quantum information science a pillar of the bilateral technology relationship and commits both sides to align on securing technology and supply chains. Funding followed in June 2026 with a five-year, $1 billion partnership[97] between the Department of Energy, MEXT and METI (subject to appropriations), making Japan the first international partner in the DOE's Genesis Mission. Eleven joint teams link twelve DOE national laboratories with twelve Japanese institutions, including RIKEN, the University of Tokyo and KEK, across six domains spanning quantum information science, fusion and advanced materials.

5.14 | International cooperation and bilateral agreements

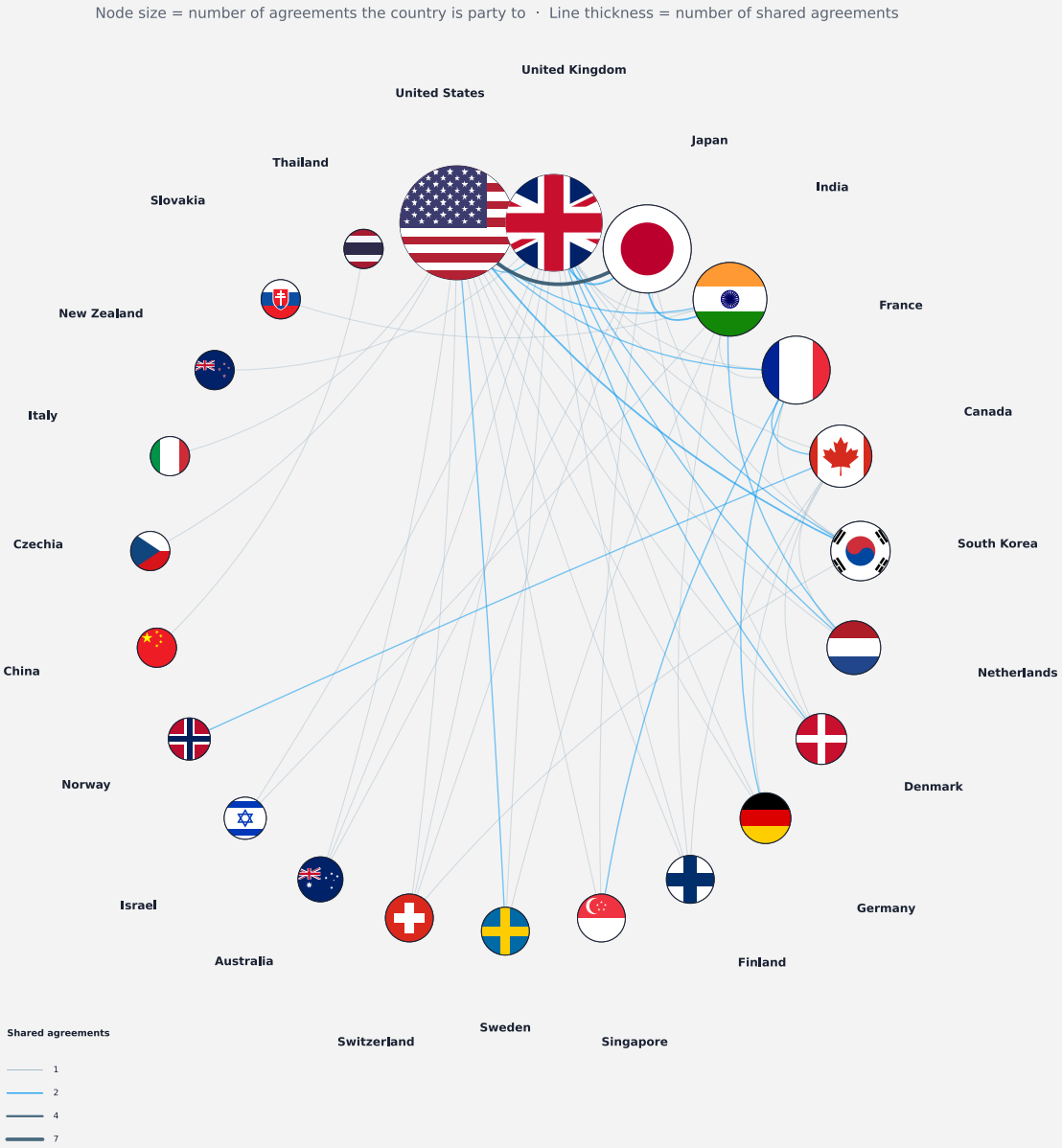
The bilateral agreements on quantum between 2021 and 2026 mark the emergence of quantum technology as a distinct axis of international diplomacy. The network diagram below visualizes the recent state of bilateral agreements on or referring to quantum technologies in order to better showcase emerging diplomatic links.

The United States and United Kingdom sit at the center as the most prominent players, followed by the next tier of Japan and India, while most countries such as New Zealand, Slovakia, Czech Republic, Italy, China, and Thailand have much smaller numbers of bilateral agreements in this domain. This might suggest that a small number of Western-aligned technology powers, each running parallel bilateral campaigns and frequently reusing the same structure, such as the U.S.'s "Joint Statement on Cooperation in QIST" and later "Technology Prosperity Deal" account for a large share of the agreements on their own.

The strongest single link in the network, U.S.–Japan, reflects a recurring bilateral channel whereas China, despite being among the leading quantum research powers, is not a prominent player in the diplomatic network of bilateral agreements between 2021 and 2026.

Fig. 5.a | Bilateral cooperation in quantum, 2021–2026

MIT Quantum Index Report



Looking at the year-over-year and specific type of the bilateral agreements in this time period, it is observed that international cooperation became much more frequent in 2023–2026.

Stand-alone bilateral quantum cooperation agreements are outnumbered by bilateral general technology-alliance diplomacy (AI, semiconductors, critical-tech pacts) where quantum technologies were explicitly included.

Footnotes

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