



2026 QUANTUM TECHNOLOGY SHOWCASE ON THE HILL

A SNAPSHOT FOR POLICYMAKERS

Quantum technology is moving out of the lab. U.S. companies are already deploying quantum sensors, building quantum networks, and operating computing systems that are rapidly maturing towards real-world applications. The U.S. leads the world today in quantum innovation, but global competition is heating up. Sustaining that lead requires a policy environment that matches the pace of quantum technology development.

\$1.9B

**GLOBAL QUANTUM
MARKET IN 2025**

30% AVERAGE ANNUAL GROWTH



\$2.7B

**PRIVATE VENTURE CAPITAL
RAISED FOR US-BASED
COMPANIES IN 2025**

+ \$1B FROM 2024



164

**US PURE-PLAY
COMPANIES IN 2025**

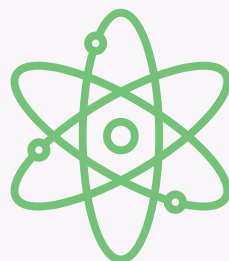
LARGEST NATIONAL COUNT AND
+11% FROM 2024



3,000+

**US QUANTUM-RELATED
JOB OPENINGS IN 2025**

GLOBAL LEADER AND +12%
FROM 2024



STATE OF THE TECHNOLOGY

The three pillars of quantum technology are at different maturities and policies should account for this.

- **Quantum sensing:** Commercially mature in several applications today. U.S. companies are delivering devices for defense, healthcare imaging, geophysical exploration, and assured position-navigation-timing in GPS-denied environments.
- **Quantum networking:** Early-stage deployments and testbeds underway. Foundational for distributed computing and sensing capabilities.
- **Quantum computing:** Significant progress in recent years, including major advances in quantum error correction and novel computing architectures across multiple qubit modalities. Timelines for achieving scientific and commercial utility are shrinking; applications in physical simulation and optimization are being actively explored in government, national labs, and industry.

MAINTAINING U.S. LEADERSHIP

U.S. quantum leadership increasingly flows from industry, resting on three foundations: supply chains, infrastructure, and workforce. Policies should reinforce each.

- **Supply chains:** Critical components like specialty optics, cryogenics, semiconductors, and control electronics depend on a narrow set of suppliers, with growing exposure to trade and geopolitical risk.
- **Infrastructure:** Scaling will require increased access to commercial-grade fabrication and packaging facilities, shared testing environments, and standards that enable interoperability and procurement.
- **Workforce:** Talent is the binding constraint to growth of the industry. Universities, community colleges, trade schools, K-12 pipelines, and apprenticeship pathways play distinct and necessary roles at scaling the number of scientists, technicians, engineers, and quantum-aware professionals the industry needs.

THE QED-C AND ITS MEMBERS RECOMMEND:

- **Reauthorization of the National Quantum Initiative with a full-stack scope:** computing, sensing, communications/networking, supply chains, workforce, and multiple qubit modalities.
- **Support** for DOE, NSF, NIST, DOD, NASA, and other lead agencies through coordination, standards, testbeds, and public-private partnerships.
- **Create early-adopter pathways** so agencies can validate applications while strengthening U.S. suppliers.
- **Create an international strategy** for this technology and coordinate with like-minded allied nations to pool resources and build trusted supply chains in strategic competition with China.

The QED-C and its members believe that these are required elements to help provide the workforce for this nascent technology while creating the foundation for the United States and its like-minded allies to win the strategic economic race against China. The international strategy is essential to reducing risks for the deep investments required to win this strategic race.