DIGITALEUROPE

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Quantum Act: Making Europe a quantum industrial powerhouse

Executive summary

Quantum technologies promise to revolutionise Europe's economy and security, but 'the current EU quantum technology programme is fragmented.'[1] To help quantum companies scale at home whilst preserving Europe's openness, the EU must provide immediate support to the quantum sector and simultaneously develop a new regulatory framework geared towards industrial application.

The Quantum Europe Strategy outlines the EU's quantum ambitions but falls short on the tools and funding required to keep pace with global competition.[2] Europe's efforts are spread thin across different funding programmes, national strategies and focus areas. This creates inefficiencies, delays the commercialisation of quantum innovation and reduces competitiveness. Despite its strong research output, Europe attracts only 5 per cent of global private quantum investment, compared with over 50 per cent going to the United States.[3]

Without substantial new public and private funding, Europe risks losing its most promising companies and talent before the Quantum Act even enters into force. The EU urgently needs to define a path to industrialisation to realise its scientific and engineering excellence in quantum, including in quantum computing, software and algorithms, hybridisation with High Performance Computing (HPC) infrastructure and quantum-safe cryptography. This means boosting investment to scale industrial capacity, spur demand and help bridge the gap to real-world applications.

- Streamline EU quantum governance and funding frameworks but avoid regulating the quantum ecosystem until technologies have matured and regulatory gaps can be clearly identified.
- Boost public and private funding to help promising quantum companies scale and compete globally. Accelerate innovation procurement and create an early market for quantum technologies.
- Incentivise and facilitate the development of applications that apply quantum solutions to specific industry challenges and dual use applications.
- Increase collaboration with trusted international partners for joint innovation, investment, manufacturing and supply chain security.
- Bridge the quantum skills gap to meet the growing demand for talent.

[1] Adam M. Lewis et al., *Future directions for quantum technology in Europe: An analysis of policy questions*, p. 90, available at https://publications.jrc.ec.europa.eu/repository/handle/JRC141050.

[2] COM(2025) 363.

[3] P. 13, ibid.

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Avoid regulating the quantum ecosystem too early

DIGITALEUROPE supports efforts to streamline the existing EU quantum governance framework. Funding programmes and processes should be streamlined to avoid diluting impact. As quantum technologies mature, better prioritisation is needed to allow promising projects to attract sufficient funding to scale and bring their solutions to market. However, many quantum technologies are still at an early stage. Regulating them now could freeze business models and hinder innovation before these technologies reach their full potential – the proposed delays to the AI Act should act as a cautionary tale.[4]

To strengthen Europe's quantum technology programme, maintaining the baseline approach (Option 1 in Pillar 1) will not be sufficient to address fragmentation. Whilst the EuroHPC Joint Undertaking (JU) can act as a bridging solution as suggested under Option 2 under Pillar 1, the Quantum Act should ultimately establish a standalone Quantum JU to coordinate the development and deployment of the full spectrum of quantum technologies over the long term. In particular, the EU should:

- **Avoid regulating the quantum ecosystem too early.** Considering the experience of the AI Act, the EU should be cautious about creating specific rules for quantum technologies and instead rely on existing horizontal laws at least until commercial use cases stabilise. The Quantum Act should focus on streamlining EU quantum governance and funding support and must be preceded by a rigorous impact assessment and an in-depth dialogue between policymakers and industry, with a particular focus on quantum startups and scaleups.

- **Streamline EU governance and strategic alignment with a dedicated Quantum Joint Undertaking (Quantum JU).** As quantum technologies mature, a dedicated Quantum Joint Undertaking is warranted to address the specific governance, infrastructure and ecosystem needs of this emerging domain. This entity should streamline funding, define benchmarks and provide a single, coherent structure to steer large-scale industrialisation efforts. A high-level Quantum Coordination Board should be established to bring together the Commission, Member States, industry and research organisations to set common objectives and investment priorities, track progress against KPIs measuring technological development and uptake, and ensure that national strategies and funding instruments are consistent with – and complementary to – the EU Quantum Strategy. The Board should also be empowered to select strategic cross-border projects and encourage Member States to build on their respective strengths to avoid duplicating under-funded projects everywhere. Until this new governance structure can be created, the EuroHPC JU can act as the central anchor of European governance, with an expanded mandate to integrate quantum infrastructures into the HPC. Other Joint Undertakings like the Chips JU can complement this role by focusing on industrialisation, quantum chip development and technology supply chains that underpin both classical and quantum computing capabilities.

- **Consider how upcoming legislation will impact incentive structures for the development and deployment of quantum technologies.** This includes the upcoming Advanced Materials Act, Space Act, Cloud and AI Development Act, the revision of the European Chips Act, the implementation of the Union of Skills, European Innovation Act, the 28th regime and future initiatives in defence. DIGITALEUROPE is active on all these initiatives.

[4] Regulation (EU) 2024/1689.

- **Set concrete targets, deadlines and funding roadmaps for migrating sensitive communications and data to post-quantum cryptography**. To protect sensitive data and critical infrastructure from future quantum threats, as well as to boost Europe's share of a maturing global market for quantum-safe cryptography, the EU must act now to initiate a coordinated transition to post-quantum cryptography. This includes setting clear goals, timelines and funding strategies for the public sector and critical sectors to be quantum safe. Cross-border coordination and alignment with international standards, such as those developed by the US National Institute of Standards and Technology, are essential for secure global communications and interoperability. To ensure a smooth transition, organisations should be encouraged to adopt hybrid cryptographic approaches combining classical and post-quantum algorithms. Strengthening organisation's cryptographic agility is equally important to enable quick adoption of updated standards as they emerge. Early adoption can additionally be supported using symmetric key exchange mechanisms, which already provide strong quantum resistance and can be deployed even before quantum communication technologies become widely available.

Boost public and private funding

Europe risks losing the quantum race because investments are too small and too scattered. According to the Joint Research Centre, US quantum firms received €2.9bn in venture capital funding in 2012-2024, whilst EU firms attracted only €862 in the same period.[5] Worse, private investments in quantum technology startups in the United States tripled between 2023 and 2024, whilst private investments in Europe declined by 40 per cent.[6] International competition and valuations are accelerating, with Australian quantum computing company PsiQuantum raising $1bn in Series E funding in 2025.[7]

The scarcity of private financing in Europe means that EU quantum startups and scaleups still depend on public funding to grow. In addition, the lack of large EU companies in the quantum computing effort constitutes a vulnerability because EU actors will be more reliant on public investment and innovation procurement. The EU, in coordination with Member States, must therefore boost and fast-track public funding aimed at supporting company growth and attracting private investment. Startups and scaleups urgently need fast, predictable access to growth capital. The 2024 European Investment Bank report shows that 'later-stage growth financing is substantially lacking' and that 'European companies are behind when it comes to raising rounds of more than €2m.'[8]

Moreover, the Quantum Act must streamline existing funding resources and lead to a sharpened focus on strategic projects. Europe's quantum funding landscape is highly fragmented, with support channelled across Horizon Europe, the European Research Council (ERC), Digital Europe, Connecting Europe Facility (ECF),the European High-Performance Computing Joint Undertaking (EuroHPC), the Chips Act, the Infrastructure for Resilience, Interconnectivity and Security by Satellite (IRIS²), the European Investment Bank (EIB), the European Space Agency (ESA), the European Defence Agency (EDA), national

[5] Adam M. Lewis et al., *Future directions for quantum technology in Europe*, p. 54.

[6] See Amires, *Quantum Technologies Investment Report 2024*.

[7] 'PsiQuantum Raises $1 Billion to Build Million-Qubit Scale, Fault-Tolerant Quantum Computers,' *The Quantum Insider*, available at https://thequantuminsider.com/2025/09/10/psiquantum-raises-1-billion-to-build-million-qubit-scale-fault-tolerant-quantum-computers/.

[8] European Investment Bank, *A quantum leap in finance: How to boost Europe's quantum technology industry*, p. 16.

programmes and more. Such dispersion dilutes impact, making it less likely that EU companies receive the funding necessary to scale, move their technologies to market and to compete globally. As the JRC notes, whilst diversity of approaches is beneficial in early research, Europe now urgently needs selection, focus and collective effort to reach industrialisation.[9]

- **Create a favourable investment environment.** Introduce targeted incentives for the development and deployment of quantum technologies in Europe. This should include coordinated tax credits for investors and companies, de-risking of private investment into the commercialisation of quantum technologies (e.g. first-loss guarantees to incentivise scaling up promising solutions), and better coordination of public funding (e.g. EIC Accelerator, TechEU programme) to crowd-in private capital for high-risk quantum ventures. It could also include super-deductions for research into potential quantum applications, accelerated depreciation of quantum-related infrastructure and reduced tax rates for quantum infrastructure investments.

- **Provide scalable and predictable public investment.** Concentrate EU investments into a limited number of strategic quantum technology projects like quantum chip fabrication facilities, which face challenges attracting private capital due to the current low-throughput environment. Funding under the Quantum Act should prioritise grants over loans to provide a clear path from lab to market, especially to finance the costly transition from proof-of -concept to product. The loan-based Grand Challenge mechanism shows that Europe's current instruments fall short of fully supporting industrialisation. An EIB loan is only of limited value to hardware companies facing long development timelines, high upfront capital requirements and a need to balance EIB loan criteria against existing and future private investments. By contrast, the French PROQCIMA programme offers a milestone-based grant.[10] It provides up to €500 million in non-reimbursable funds to five quantum hardware companies over ten years, with reviews every two years and progressive selection of the best-performing technologies. This model shows how long-term, milestone-based grants can de-risk hardware development, support multiple approaches in parallel and channel investment toward industrial-grade quantum systems. The next funding framework under the Quantum Act should draw on such approaches to ensure Europe can retain and grow its most promising quantum companies.[11]

- **Unlock risk capital fast for innovative startups**. Enable the European Innovation Council Accelerator and Scaleup Budget to take bigger equity stakes in promising ventures. The EIC STEP Scaleup budget is insufficient to compete with venture capital funding in the US and elsewhere. Align EIC STEP equity grants (€10-30m) with the EIB Scaleup scheme to offer blended finance for deep tech commercialisation. Accelerate funding decisions to match the speed of private venture capital – decisions need to be made within three months. Reserve funding envelopes for quantum hardware and applications.

- **Establish a unified EU procurement platform for critical technologies, including quantum to create a virtuous cycle for investments**. EU companies need demand to scale up; innovation

[9] Adam M. Lewis et al., *Future directions for quantum technology in Europe*, p. 90.

[10] See https://quantique.france2030.gouv.fr/acces-aux-marches/programme-proqcima/.

[11] The OECD's *An overview of national strategies and policies for quantum technologies* lists several successful examples of grants that fund industry-led projects and partnerships to demonstrate commercial viability and cultivate demand for quantum technologies. See https://www.oecd.org/en/publications/an-overview-of-national-strategies-and-policies-for-quantum-technologies_5e55e7ab-en.html.

procurement can create lead markets. For example, the EU should expand procurement of quantum computers and hybrid high-performance computing via the EuroHPC joint undertaking to spur demand. By embedding quantum processors as accelerators within Europe's HPC infrastructure, procurements can deliver early benefits, attract new user communities and ensure that quantum investments are anchored in Europe's digital strengths. AI Factories and AI Gigafactories provide a template and offer opportunities to deploy hybrid HPC-QC systems to power AI development. Available EU and Member State funds should be channelled toward these high-impact projects and the interlinked downstream commercialisation of quantum applications to maintain a strategic focus on key technologies, infrastructure and large-scale deployment. Beyond the EuroHPC-driven procurements of infrastructure, public procurement should also be used strategically to create demand in broader sectors of the economy. Innovation-oriented models such as pre-commercial procurement and innovation partnerships, ideally coordinated across Member States, allow public buyers to co-develop emerging solutions whilst mitigating risk.

- **Boost uptake of quantum technologies for European defence and security.** Initiatives under the European Armament Technological Roadmap can support the industrial deployment of quantum technologies. This can be achieved through co-designing procurement priorities and better reflecting operational needs across defence and dual-use markets via the new Strategic Dialogue with industry announced in the EU Defence White Paper.[12] The EU should prioritise a framework where civil innovation feeds into defence applications through structured 'spin-in' mechanisms. Moreover, EU quantum efforts should be linked with NATO's Innovation Fund and Defence Innovation Accelerator for the North Atlantic (DIANA) to incentivise deep tech innovation and stimulate demand for quantum-enabled defence technologies like encryption, sensing and secure communications. These initiatives, together with the European Defence Agency's Hub for EU Defence Innovation and its Capability Technology groups, can help test quantum technologies, strengthen interoperability and accelerate the integration of quantum applications within a broader transatlantic innovation ecosystem.

- **Support public-private partnerships:** The EU should foster more strategic public-private partnerships in quantum by supporting national initiatives that align industry and public funding. A strong example is Denmark, where the Novo Nordisk Foundation committed €200 million over 12 years to build a general-purpose quantum computer in collaboration with the Niels Bohr Institute. This initiative helped establish Denmark as a host of NATO's DIANA Quantum Centre. Similar EU-backed efforts could accelerate innovation, deepen academic-industry links, and strengthen Europe's leadership in quantum technologies.

- **Adopt business-friendly IP frameworks for EU-funded collaborative infrastructure and projects.** Today, EU-funded projects often leave ownership of results with research organisations, which limits companies' ability to use and commercialise innovations they helped develop. Collaborative projects, pilot lines and Quantum Sandboxes should operate under IP frameworks that balance contributions fairly and allow vendors to exploit and license results. Without such clarity, investment will remain constrained, and companies will be discouraged from committing their best technologies to European programmes.

[12] See European Commission, *White paper on European defence – Readiness 2030*.

Translate research into industrial applications

Europe's world-class quantum research too often remains confined to academia and does not translate quickly enough into deployable industrial solutions. The EU is home to a substantial share of quantum companies, accounting for 32 per cent of the total, generally younger and smaller. However, the EU only accounts for 6 per cent of global patents on quantum, with China dominating the field, owning 46 per cent of global patents, followed by the US with 23 per cent.[13]

As the technologies mature, the Quantum Act must create a regulatory and funding framework geared towards industrial application. This requires an approach consistent with Option 3 in Pillar 2, which provides the dedicated EU-level tools needed to scale capacity to commercialise quantum technologies, including new incentives to help companies develop concrete quantum technologies and algorithms that address specific industry challenges across optimisation, simulation, sensing, communication and cryptography. It also requires support to better showcase the benefits of quantum technology to potential customers and create a market.

- **Develop a 'Apply Quantum' roadmap with sector-specific adoption strategies.** The Quantum Act should ensure that Europe is ready to deploy quantum-enabled applications as soon as scalable hardware becomes available. This requires enabling end-users to explore the potential benefits of quantum solutions early, which can be accomplished though testbeds and tailored support to experiment with hybrid classical-quantum workflows. This would ensure that organisations can begin building quantum readiness ahead of hardware maturity, reducing future integration costs. Modelled on the Apply AI Strategy, which combines sectoral initiatives and support measures to foster the adoption of AI, the Commission should develop an 'Apply Quantum' roadmap with industry. This roadmap should bring together quantum developers and potential end-users from the private and public sectors to identify the most promising quantum use cases for sectors such as manufacturing, pharmaceuticals, chemicals, logistics, energy, and finance. It should include targeted funding, pilot deployment schemes and demand-side measures to support early adoption and validate practical quantum advantages.

- **Accelerate industrial application through sandboxes and benchmarking.** The Quantum Act should incentivise closer collaboration between quantum developers and end-users to ensure that quantum algorithms and software solutions address real, high-value industrial challenges. The ecosystem currently suffers from fragmentation: startups and scaleups often lack access to the end-user perspective, concrete use cases and industry data, making it difficult to identify the most promising applications or test technologies in operational environments. To overcome this, the EU should invest in sandboxes and testbeds that provide companies with real-world conditions to develop, demonstrate and benchmark quantum solutions. Establishing EU-wide Quantum Sandboxes, a concept announced by President von der Leyen in September 2025, would offer a structured way to test ideas, accelerate iteration cycles and build early markets. They must be understood broadly: not only physical facilities but also cloud-based access points that enable widespread experimentation with European-owned quantum systems. By embedding these Sandboxes into AI Factories and EuroHPC centres, Europe can ensure that quantum technologies are connected to its strongest digital infrastructures, attract diverse user communities and accelerate the development of algorithms and applications. As part of this effort, the EU should also pursue a benchmarking challenge with substantial funding modelled on the US Defense

[13] Adam M. Lewis et al., *Future directions for quantum technology in Europe*, p. 6.

Advanced Research Projects Agency (DARPA) Quantum Benchmarking Initiative, to evaluate quantum computing applications, validate algorithms and hardware. Strengthening government evaluation and validation programmes would create trust, ensure interoperability and generate early demand signals for industrially useful quantum systems.[14]

- **Support the development of quantum software.** Quantum computing progress depends as much on software and algorithms as on hardware, yet policy debates – including the Quantum Europe Strategy – often overlook the software dimension. Lessons from software engineering reveal that the adoption of new technologies by the industry hinges on the ability to develop software in a repeatable, efficient, maintainable, reusable, and cost-effective manner. Current quantum software lacks the development procedures and standards prevalent in classical computing. To unlock industrial value, the EU should prioritise the development of European quantum software stacks and development environments that can run on today's small and medium-scale quantum devices. Advances in quantum software will also lower the compute power needed to solve quantum algorithms, thus helping realise quantum advantage faster and more cost-efficiently.

- **Support hybridisation efforts as part of EuroHPC.** Although Europe has begun embedding quantum computers into EuroHPC infrastructures, more is needed to give companies affordable and practical access to experiment with hybrid workflows and learn how to allocate tasks between quantum and classical resources. Because quantum computing can provide exponential speedup only for a limited set of problems, a key question will be how to partition problems so that quantum advantage can be realized. The Quantum Act should support hybridisation efforts, including through innovation procurement, dedicated software development (incl. workload management tools and data transfer solutions) and clear access policies to quantum infrastructures for businesses. This could take inspiration from the AI Factories, which provide dedicated access to startups and scaleups.

- **Establish EU quantum centres.** To build on strong national ecosystems and avoid fragmentation, the Quantum Act could support the creation of EU quantum centres, anchored in existing national strengths. These centres would serve as EU-recognised hubs for targeted funding support, talent development and innovation, ensuring that local excellence can grow into European capability. By structuring EU investment around these centres, Europe can accelerate industrialisation, reduce duplication across Member States and establish a coherent network of complementary quantum capabilities across the Union.

- **Strengthen quantum chip pilot lines and support a European first-of-a-kind quantum foundry**. Europe's ability to lead in quantum will depend on how quickly it can move from prototypes to industrial-scale production. Pilot lines are central to this effort. The EU is already moving to establish quantum semiconductor pilot lines, but they require further support to provide access to advanced tooling and cleanroom facilities that individual startups and scaleups cannot afford on their own. These shared facilities could enable companies to validate processes, develop chips and begin scaling production. As pilot lines demonstrate their value and technologies mature, Europe should take the next step and establish a dedicated quantum foundry. This first-of-a-kind facility would consolidate the most critical tools and processes into a permanent industrial

[14] See Defense Advanced Research Projects Agency (DARPA) Quantum Benchmarking Initiative, available at: QBI: Quantum Benchmarking Initiative | DARPA

infrastructure, bridging the gap between prototyping via pilot lines and commercial-scale manufacturing. Supported through the Chips Act 2.0 with EU, national and private co-investment, such a foundry could anchor quantum processor production in Europe.

Increase collaboration with trusted international partners

International collaboration brings great benefits because quantum technologies require a range of highly specialised components and skills, which can be most efficiently developed together with trusted international partners. To enhance supply chain resilience together with reliable partners, the EU should streamline its export control and FDI screening mechanisms.

We do not know where the next breakthrough innovation will be coming from, illustrating the need to foster cooperation across borders. By pooling expertise, aligning strategic investments and creating shared markets for quantum technologies, the EU and like-minded partners can accelerate progress and support collective resilience. At the same time, Europe must ensure that cooperation is reciprocal and does not create dependencies on external suppliers or platforms.

- **Boost collaboration with the US, the UK, Canada, Japan and other key allies.** Engage key allies as strategic security and economic partners, including by encouraging joint investment, coordinating export control lists and consult industry before adding restrictions so economic openness and European security advance together. Clear economic security criteria should guide these collaborations.

- **Ensure that potential Buy-European provisions remain fully compatible with joint research & innovation, manufacturing and investment with like-minded countries.** Pursuing strategic autonomy must go hand in hand with deepening global partnerships that pool expertise and accelerate deployment of critical technologies. The EU's quantum governance framework must support openness to trusted partners, ensuring that cooperation with non-EU universities, labs and companies remains possible across the supply chain. Quantum technologies require highly specialised knowledge and inputs. Prohibiting European companies to access foreign technologies could set back European innovation and competitiveness. For example, Europe remains dependent on trusted partners for critical components such as cryogenics, lasers, photonics and specialised materials.

- **Coordinate supply chain diversification with trusted partners to reduce strategic vulnerabilities**. Dedicated funding windows for cross-border demonstration and validation projects and pre-commercial procurement would unlock new avenues for cooperation, demand creation and market uptake, helping Europe build resilient, interoperable quantum value chains whilst safeguarding its competitiveness and strategic autonomy.

- **Streamline dual-use export controls and investment screening.** Enhance cooperation between the Commission, Member State authorities and industry on controls and investment screening for quantum technologies. Simplify export authorisations to allow frictionless collaboration with trusted partners, potentially modelled on the UK Export Control Joint Unit's open export general licence to cover exports of chip and quantum technologies to the EU and other allies like the US.[15]

[15] See UK Government Open general export licences (OGELs) - GOV.UK

Bridge the quantum skills gap

Europe leads in quantum research, with over 100,000 quantum-ready experts – the highest absolute number and density at 231 per million inhabitants.[16] Yet, talent shortages threaten to slow commercialisation of ideas. Demand for quantum experts already surpasses supply for interdisciplinary profiles that blend computer science, experimental physics, photonics, electronics and business acumen. At the EU level, this imbalance between the demand and availability of quantum talents is worsened by the outflow of talent to destinations with more and better employment opportunities.[17] As the quantum race accelerates, the gap will widen sharply. To secure a quantum-ready workforce, the EU must:

- **Scale interdisciplinary education.** Offer targeted funding for hands-on Master's and PhD programmes that pair quantum physics with chemistry, maths, AI, finance. Boost public-private partnerships to ensure students across these disciplines have early access to quantum hardware and simulators, identify critical gaps and align certifications with emerging needs across quantum and digital fields. The European Quantum Skills Academy is presently underfunded and should be strengthened as the central hub for education and training. It should go beyond its current academic curricula to include applied industry tracks open to engineers, machinists, micromechanics and other technical professions, with access to labs, equipment and software.

- **Launch rapid reskilling and upskilling schemes.** The upskilling and reskilling of professionals is of critical importance, as demand for ICT and STEM talents spans all industries. Use existing programmes like Erasmus+, Marie Skłodowska-Curie and Digital Europe to support short courses and fellowships that enable professionals to pivot into quantum roles. Research and Technology Organisations can act as training hubs, create synergies between industry and academia.

- **Attract and retain global talent.** Support Member States with introducing Critical Technology Visa that grant accelerated work permits across the Single Market. Harmonise and improve employee equity option schemes across Member States to attract and retain specialists in critical fields. Offer EU-level co-funding for industrial PhDs, post-docs and secondments and allow Horizon Europe projects to budget market-rate salaries to keep top researchers in Europe.

- **Put forward a Council recommendation to certify two million ICT** specialists annually for the next five years and establish a coordinated tax deduction scheme for firms investing in certifying workers for critical technologies like quantum computing.

- **Supporting quantum standardisation**: Boost skills training and financial support to advance standard-setting on quantum led by industry, including quantum startups and SMEs supported by EU-funded programmes as recommended by the Commission Multi-Stakeholder Platform Task Force Research & Innovation and standardisation. Provide companies, especially SMEs, with funding support to participate in quantum standardisation at international level as recommended by the High-Level Forum on Standardisation deep dive on funding.[18]

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[16] See Mario Draghi, The future of European competitiveness – Part B: In-depth analysis and recommendations

[17] Ibid.

[18] See European Commission's High-Level Forum (HLF) recommendations on increasing funding for standardisation activities at international level, available at https://ec.europa.eu/docsroom/documents/62954

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About DIGITALEUROPE

DIGITALEUROPE is the leading trade association representing digitally transforming industries in Europe. We stand for a regulatory environment that enables European businesses and citizens to prosper from digital technologies. We wish Europe to grow, attract and sustain the world's best digital talents and technology companies. Together with our members, we shape the industry policy positions on all relevant legislative matters, and contribute to the development and implementation of relevant EU policies. Our membership represents over 45,000 businesses who operate and invest in Europe. It includes corporations which are global leaders in their field of activity, as well as national trade associations from across Europe.

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