ALTAIR STRATEGIC OUTLOOK

INDEPENDENT RESEARCH. STRATEGIC PERSPECTIVES.

Europe's Quantum Future

Beyond the Technology



Science. Industry. Capital. People. Trust.

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CHAPTER 11 / DEMAND

11.2 | Strong expectations, limited engagement

A representative German survey published by Bitkom in March 2026 provides a buyer-side perspective that complements the EU supplier and procurement mappings. Telephone interviews were conducted with 607 manufacturing and service companies with at least 100 employees in late 2025. [60]

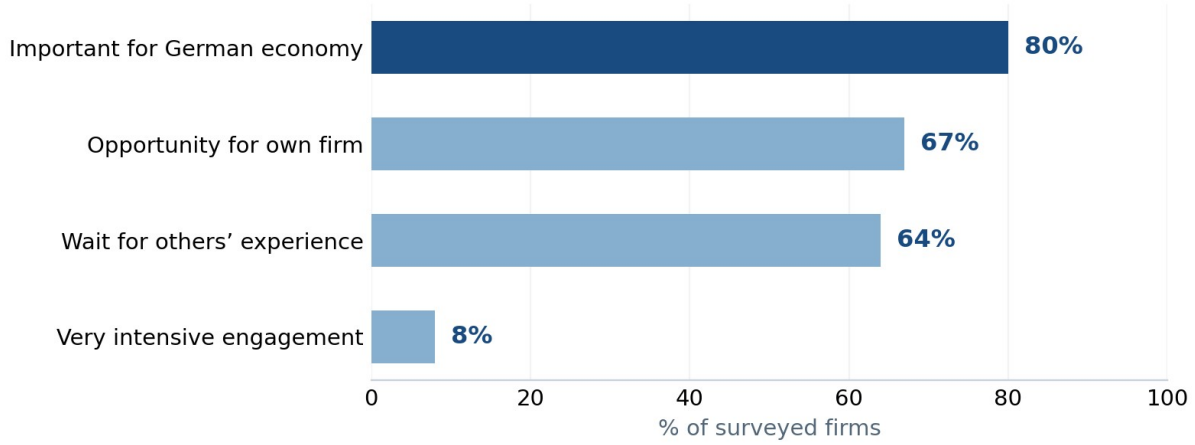


Figure 11.1. Bitkom [60], 607 companies; selected separate questions, rounded percentages. Attitudes and engagement are not purchases; results do not describe the EU as a whole.

The gap between favourable expectations and intensive engagement suggests that awareness alone does not create demand. Waiting can be rational: a company may need a clearer use case, a more robust supplier or a better cost-performance proposition. Conversely, early testing can create learning and options even where an immediate financial return is uncertain.

Among firms already interested in or using quantum computing, 69% indicated that funded pilots would help, 67% wanted easier or subsidised platform access and 66% sought better market orientation. [60] This is a different survey subset; its size is not specified in the press release. These preferences are not purchasing commitments.

Implication: policy designed to promote adoption should distinguish awareness, willingness to experiment, willingness to pay and willingness to renew. Subsidised platform access can support exploration, but use at a subsidised price is not proof of unsubsidised demand.

PART III / CHAPTER 16

The Altair Quantum Readiness Framework

Seven dimensions — an operational research instrument

Readiness is not a synonym for leadership, spending or technological maturity. It is the combination of capabilities that allows an ecosystem to develop useful technologies, scale them economically, make knowledge accessible and protect trust. The seven dimensions below connect the original Signals with the evidence gathered in Part II.

16.1 | What to measure, and what not to infer

Dimension	Primary indicator proposal	Interpretation boundary
Science	International patent families and field-normalised research impact.	Research influence is not commercial output.
Industry	Qualified capacity and substitutability of critical inputs.	Supplier presence is not resilience.
Demand	Paid deployment and repeat purchasing in eligible cohorts.	Product availability is not revenue.
Capital	Investment by stage, recipient geography and completed milestones.	Fund targets are not invested cash.
People	Competence outcomes and relevant job transitions.	Vacancies are not employment.
Security	Verified migration of inventoried risk-priority systems.	Plans are not protection.
Coordination	Cross-border utilisation and joint projects reaching outcomes.	Participation is not effectiveness.

Table 16.1. Altair Media proposed measurement architecture. Indicator definitions require validation. No scores or weights are assigned.

The companion workbook includes an indicator dictionary, baseline anchors and measurement rules. It deliberately keeps contextual proxies separate from direct indicators. It also distinguishes a missing observation from a measured zero.