

Special Analysis

QC Supplier Partnerships: Widespread Motivations and Activities

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SUMMARY

A recent Hyperion Research study of 82 quantum computing (QC) suppliers from North America, Europe, and the Asia Pacific, conducted at the behest of the US-based Quantum Economic Development Consortium, revealed that partnerships have become an important activity across the QC supplier sector. The study found that 83% of the QC companies surveyed had partnerships with other QC supplier(s), 74% had partnerships with at least one government research organization, and 71% had partnerships with at least one QC end user. Motivations for such partnerships varied widely and most were initiated to address more than one key objective.

- Partnerships among QC suppliers were most often established to gain access to QC-related technical expertise, to a larger customer base within key sectors or verticals, and to additional financial resources.
- Partnerships established with government research facilities sought to gain access to government funding and government-funded QC research efforts, to explore the potential of hybrid quantum/classical systems, and to foster QC supplier public attention and increase visibility.
- Partnerships with QC end users targeted the exploration of new sector or vertical-specific QC opportunities, the ability to field test and evaluate new QC hardware and software, as well as to explore key QC performance advantages over classical counterparts.

As the overall quantum computer sector begins to shift its emphasis from R&D to a more focused approach on commercialization opportunities, the majority of QC companies surveyed are seeking ways to efficiently round out their overall QC competitive position. Firms are moving to bolster remaining gaps in their technology capabilities, product lines, and market position while looking to better address and more finely focus on various key markets and end users.

That said, there are still some issues that likely will need to be resolved soon and that may point to underappreciated components of an otherwise successful QC supplier technology and marketing capability.

- Partnerships with counterpart QC suppliers, government agencies, and even end users for access to classical IT technology or expertise were considered a low priority by most respondents, suggesting that respondent organizations have not yet fully appreciated the relative importance and complexity of integrating quantum systems into an existing or planned classical IT or related HPC ecosystem.

- QC supplier relationships with government research facilities centered primarily on issues surrounding funding, procurements, or tapping into the perceived value-added of government interest in a particular QC-related technology or company. However, only about one in four respondents cited government partnerships as a mechanism for access to leading-edge government QC research in algorithms, applications, or software. This suggests that the majority of respondents do not see government QC research efforts in those areas as a major source of such capability or simply do not see such government efforts being in step with their individual QC development strategy.
- For every potential partnership option, the value of garnering public attention was selected by about 35% to 40% of the respondents, suggesting that there is some awareness within the QC supplier base that gaining visibility is a worthwhile way to highlight, if not differentiate, an organization's particular QC capabilities amidst the current wide base of QC competitors.

SURVEY SPECIFICS

The survey gathered input from 115 different respondents representing 82 different QC supplier firms:

- 54% of respondent organizations' headquarters were located in North America, 24% in Europe, and the remainder in the Asia Pacific region.
- The single largest categories of respondents' main products or services were direct sellers of QC hardware, QC professional service providers, cloud service providers of QC services, and direct sellers of QC software. However, most respondents selected more than one option for their organization's main line of business.
- 80% of the respondents' organizations were private, with only about 1% planning to go public in the next two years, 25% in 3 years or more, and 40% having no current plans to go public.

When asked about their specific QC partnership with other QC suppliers, as seen in Figure 1, 83% (68 out of 82) of respondent organizations have a commercial partnership with at least one other QC supplier, and the average respondent selected 3.4 options.

- Access to QC expertise (42.6%), a focused client base (39.7%), and financial resources (38.2%) topped the list of selected QC supplier partnership objectives
- Partnerships to gain access to classical IT technology or expertise were considered a low priority (16.2%)
- IP was not yet seen by most as an overwhelming concern, at least from a partnership perspective (10.3%)

FIGURE 1

QC Partnerships with QC Suppliers

Option	% Selected
Access to QC-related technical expertise	42.6%
Access to larger customer base within key sectors/verticals	39.7%
Access to financial resources	38.2%
Access to new QC-related hardware technologies/capabilities	35.3%
Foster public attention	35.3%
Access to new QC-related software capabilities/capabilities	33.8%
Access to new sectors/verticals (e.g., financial, energy, pharmaceuticals)	23.5%
Access to new geographic markets	23.5%
Access to fill QC-related hardware product gaps	20.6%
Access to classical IT technology	16.2%
Access to fill QC-related software product gaps	10.3%
Access to IP, patents, or proprietary information	10.3%
Access to classical IT experts	8.8%
Other	2.9%

N = 68, Select All That Apply

Source: Hyperion Research, 2025

When asked about partnerships with the government research community, as seen in Figure 2, 74% (61 out of 82) of respondent organizations have a partnership with at least one government research organization, and the average respondent selected 4.9 options.

- The most selected objective for a partnership was to gain access to government funding, by almost two-thirds of the respondents (62.3%)
- Access to government-funded QC research ranked high (42.6%), and hybrid QC/classical work was also of high interest (39.3%)
- Access to classical IT technology - in hardware, expertise, software - was not a top priority for government partnerships

FIGURE 2

QC Partnership with the Government Research Community

Option	% Selected
Access to government funding	62.3%
Access to government-funded QC research activities	42.6%
Explore the hybrid quantum/classical QC systems	39.3%
Foster public attention	36.1%
Access to leading-edge QC hardware development	34.4%
Access to key advanced quantum computing experts	32.8%
Explore key government QC use cases	31.1%
Explore key government QC applications	29.5%
Explore the co-design of QC systems	27.9%
Access to leading-edge QC research in algorithms	26.2%
Help develop quantum/classical hybrid algorithms	24.6%
Access to leading-edge QC research in applications	21.3%
Support for publication of QC-related research in key journals	18.0%
Access to leading-edge QC software development	16.4%
Access to key advanced classical computing hardware	13.1%
Access to key advanced classical computing experts	8.2%
Access to key advanced classical computing software	8.2%
Other	4.9%

N = 61, Select All That Apply

Source: Hyperion Research, 2025

When asked about partnerships with QC end users, as seen in Figure 3, 71% (58 out of 82) of respondent organizations have a partnership with at least one QC end user, and the average respondent selected 4.2 options.

- Exploring sector-specific opportunities was the overwhelming justification for such partnerships (74.1%)
- Field testing QC hardware and software were both selected at a high rate (44.8%)
- Building sector-specific skills (41.4%) and exploring QC performance advantages (43.1%) were also cited as key drivers

FIGURE 3**QC Partnership With QC End Users**

Option	% Selected
Explore new QC sector/vertical-specific QC-related opportunities	74.1%
Field test/evaluate new QC hardware	44.8%
Field test/evaluate new QC software	44.8%
Explore key performance gains over classical counterpart	43.1%
Establish sector-specific capabilities	41.4%
Foster public attention	39.7%
Encourage follow-on sales	36.2%
Explore QC/classical integration issues	31.0%
Access QC end user QC expertise	29.3%
Explorer QC sector/vertical-specific performance opportunities on existing classical workloads	27.6%
Access QC end user classical IT expertise	8.6%
Other	5.2%

N = 58, Select All That Apply

Source: Hyperion Research, 2025

ANALYST COMMENT

The QC supplier sector is transitioning from centering on R&D efforts that explore and implement performant qubit modalities and capabilities to focusing on the larger issues of identifying and meeting the technical deployment and operational requirements of QC end users across a wide range of verticals. Currently, according to one recent independent report, there are now more than 80 different quantum computing suppliers in the global market today, spread across more than 20 countries. In order to stand out, QC suppliers will increasingly need to refine and then delineate their value added to the overall QC hardware and software stack.

- As such, QC development milestones will likely shift away from the currently oft-cited technical metrics such as T1 or T2 times, one or two bit gate error rates, and even physical qubit counts.

- In their place will likely come more sophisticated and end user related metrics and standard benchmarks that allow for a better representation of a QC's overall compute capability, enabling reliable comparisons that transcend QC modalities and architectures.
- Increasingly, pressure from a growing base of current and aspiring QC end users will call for metrics that realistically address either potential or demonstrated performance gains on real-world use cases, particularly where they can challenge the performance capabilities of counterpart classical systems.

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Hyperion Research provides data-driven research, analysis and recommendations for technologies, applications, and markets in high performance computing and emerging technology areas to help organizations worldwide make effective decisions and seize growth opportunities. Research includes market sizing and forecasting, share tracking, segmentation, technology, and related trend analysis, and both user & vendor analysis for multi-user technical server technology used for HPC and HPDA (high performance data analysis). Hyperion Research provides thought leadership and practical guidance for users, vendors, and other members of the HPC community by focusing on key market and technology trends across government, industry, commerce, and academia.

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