Key Inclusion Indicators for Quantum Technologies in Europe

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Document elaborated by

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Presentation

Maintaining Europe's leadership in quantum technologies requires a coordinated and inclusive effort among all EU Member States. By working together, the Union can maximize resources, foster innovation, and build a resilient, world-class quantum ecosystem. Promoting inclusion and diversity is a core objective of the European Research and Innovation (R&I) agenda. Within the Quantum Flagship, particular attention is given to ensuring the participation of **Widening Countries*** and improving **gender representation** in quantum technologies. The active involvement of widening countries is essential to ensure balanced growth, broaden the talent base, and strengthen the European Research Area.

A truly united approach will be the foundation of Europe's quantum excellence on the global stage. In such a context, the **Strategic Advisory Board (SAB)** of the Quantum Flagship, proposed a dedicated set of **Key Inclusion Indicators (KIIs)** to monitor and promote progress in these areas. These indicators complement the existing Key Performance Indicators (KPIs), by providing a more comprehensive view of the maturity and inclusiveness of the European quantum landscape. The KIIs monitor three aspects:

1. **Closing the Strategy Gap**: Number of EU27 Member States with a dedicated and funded national programme for quantum technologies.
2. **Geographical Inclusion**: Percentage of academic and industry beneficiaries from Widening Countries in EU-funded quantum technology projects.
3. **Gender Inclusion**: Percentage of female representatives as project leaders/principal investigators in EU-funded quantum technology projects.

At the SAB meeting held on 14 February 2024 in Brussels, members emphasized the importance of publicly sharing these indicators. Transparency was recognized as a key driver for raising awareness, ensuring accountability, and supporting long-term improvement— especially in the context of ongoing workforce challenges. The KIIs were unanimously approved during the meeting. It was also agreed that the indicators would be published annually, in alignment with the KPI reporting cycle, through a standalone report made available via qt.eu.

Given the complexity and long-term nature of systemic inclusion issues, and acknowledging that the Quantum Flagship can only influence a limited set of contributing factors, the SAB decided not to associate the first iteration with specific targets or external benchmarks. Instead, this first KII publication focuses on establishing **baseline measurements** based on 2024 data. Further discussions within the SAB will guide the development of targets or comparative indicators for future editions.

*Widening countries refer to EU Member States with relatively low R&I development, receiving targeted support under Horizon Europe to strengthen their participation. These include: Bulgaria, Croatia, Cyprus, Czechia, Estonia, Greece, Hungary, Latvia, Lithuania, Malta, Poland, Portugal, Romania, Slovakia, and Slovenia.

The first KII is based on publicly available information. The values for the second and third KIIs are derived from large-scale datasets provided by the European Commission and are considered statistically significant. Although this edition does not yet include annual progression or target values (indicated as n/a), these aspects will be incorporated as the indicators and related policy tools continue to evolve.

References

The sources of the 2024 KII values are as follows:

1. Source: government representatives and Quantum Community Network (QCN).
2. Source: EC database for active projects in 2024, including Horizon Europe, DEP and EIC Pathfinder projects, and quantum projects in Euramet.
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Key Inclusion Indicators

1. Closing the strategy gap

Number of EU27 countries with a dedicated national programme for quantum technologies. Only national programmes with funding are eligible for this KII.

2024 value	12
progression/year	n/a
2030 target	27

2. Geographic inclusion

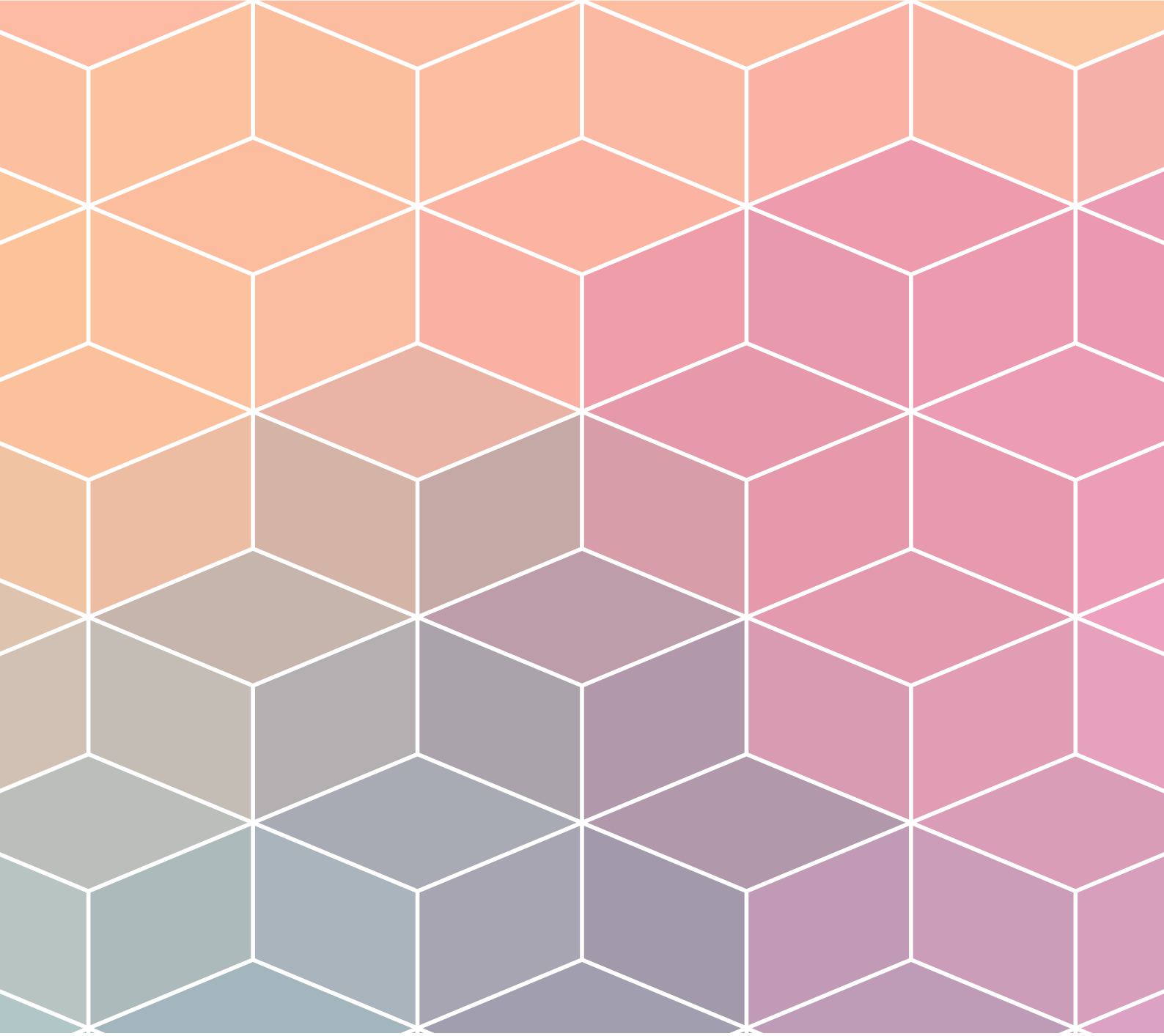
Percentage of academic and industry beneficiaries from Widening Countries in EU-funded quantum technology projects.

2024 value	16%
progression/year	n/a
2030 target	n/a

3. Gender inclusion

Percentage of female representatives as project leaders/principal investigators in EU-funded quantum technology projects.

2024 value	24%
progression/year	n/a
2030 target	n/a



QUANTUM FLAGSHIP

European Commission

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Feedback on this document or suggestions for its future editions can be send to: observatory@pqi.pt

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