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# National Quantum Fault Lines

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**Abstract**

The national strategic architectures for quantum-supremacy attainment are mapped and compared in terms of capabilities, implementation timelines, and investment priorities. Supporting-evidence assessment spans funding, talent, infrastructure, and other inputs, yielding architectural gaps and leverage points of national and international significance. Analysis highlights implications for development policy and governance.

The United States, European Union, China, and several others have articulated major, long-term quantum-supremacy initiatives. The commitment scale, expected utility, key stakeholders, and supporting trajectory differ significantly among actors. Quantifying funding, talent, and supporting frameworks clarifies the feasibility and fit of quantum architectures in a broader national-competitiveness context.

**Keywords:** Quantum Supremacy Strategies, National Quantum Architectures, Capability Benchmarking, Implementation Timelines, Investment Priorities, Evidence-Based Assessment, Quantum Funding Landscapes, Talent Pipelines, Research Infrastructure, Architectural Gaps, Strategic Leverage Points, Development Policy Implications, Governance Frameworks, Global Quantum Competition, National Competitiveness, Stakeholder Ecosystems, Long-Term Quantum Initiatives, Comparative Policy Analysis, Technology Sovereignty, Strategic Feasibility.

## 1. Introduction

Quantum computing promises to exceed classical capabilities for certain tasks, enabling previously impossible computations in fields such as materials design, drug discovery, and machine learning. Although not yet realized, this potential has prompted massive investments from the United States, European Union, China, and Japan, among others. Racing to seize strategic advantages, these actors define national architectures for quantum supremacy—major programs that integrate funding, timelines, talent direction, industry engagement, and international collaboration plans. A comparative examination illuminates approaches, resources,

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and central objectives, revealing insights for governance, construction of machine-native algorithms, and feasibility of machine-demonstrated advantage.

Advantage and its compelling applications remain theoretical, so present development efforts focus on demonstrating brief circuits of higher quality—greater fidelity, less noise, deeper deadlines—than those of generally deployed machines. The relative performance of nation-specific prototype machines reflects not only the capabilities of individual qubit types but also other site-specific characteristics. Comparison of quantum circuits with classical architectures requires specialized metrics and benchmarking. Performance for tasks such as sampling from distributions, solving random instance problems, and executing certain algebraic operations can be independently validated. Evaluation using standard suites enables discipline, reproducibility, and accumulation of scaling data.

### 1.1. Overview of Quantum Computing Development and Significance

Quantum computing has captured public interest owing to significant progress in optimizing and scaling candidate Quantum architectures and the practical use of computers. Such efforts have enhanced coherence times, speeded-up operation and improved crosstalk and gate fidelity - key elements of quantum circuits. However, demonstrations of Quantum advantage remain limited. Future demonstrators seek to verify Quantum Advantage over classical computers for narrow regimes, but no implementation can be considered truly useful. Moreover, any achievement of Quantum Supremacy will come from carefully engineered circuits running at least 1,000,000 times faster than state-of-the-art High-Performance Computers - a practical need

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for the most critical industries and the economy.

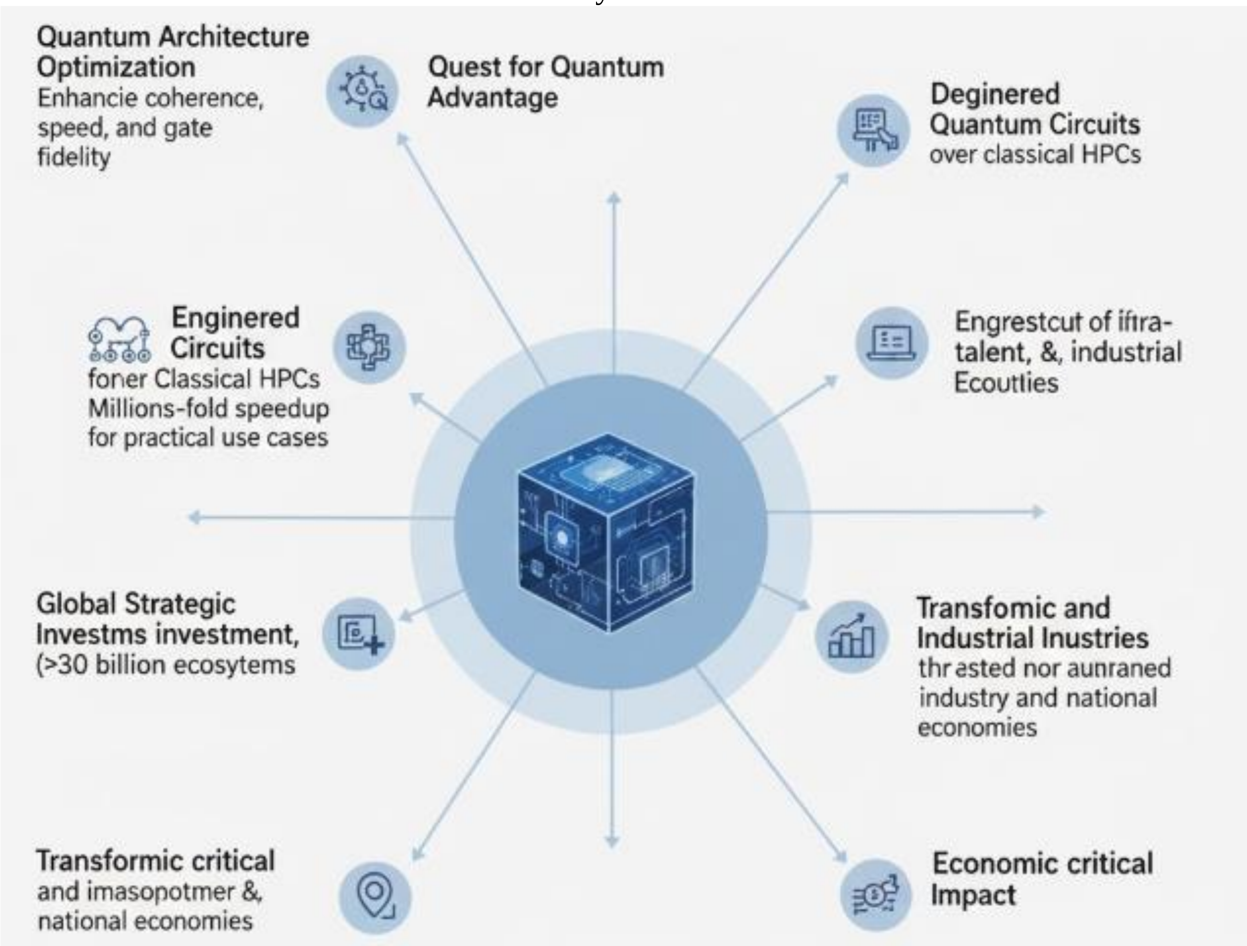


**Fig 1: Bridging the Quantum Gap: Strategic Investment and Technical Milestones Toward Practical Quantum Advantage**

Quantum computers provide a new paradigm for information processing and are viewed by national governments as crucial for future economic competitiveness. The strategic role of quantum computing has become evident as countries seek Strategic initiatives in this area, with investment flowing into funding, Infrastructure, talent pools and industrial ecosystems. Investments in quantum computing at government-level announcements to date amount to

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around $30 Billion, indicating that nearly all nations are recognising the potential benefits of quantum computing.

## 2. Conceptual Foundations of Quantum Supremacy

The argument centers around the emergence of quantum supremacy—the point at which a quantum computer surpasses a classical computer—and the race among nations to reach this milestone. Supremacy is a paramount objective in the development of quantum computers; however, it is defined as a one-off demonstration rather than an operational benchmark that advances practical quantum advantage. As error rates decrease and operating depth increases, practical quantum advantage—the region at which quantum computers outperform classical systems in real-world tasks—becomes accessible. Investment is now being directed to systems in this region, which can deliver utility beyond early prototype systems.

Two derivations of quantum advantage provide the foundational motivations for architectural development. The first shows that there exist functions computable by quantum devices in lower complexity classes than by classical devices. The second establishes that such functions also exist for noisy quantum devices, provided that noise can be tolerated at sufficiently high levels. A third consideration is the expected operating noise levels of near-term and fault-tolerant devices. Evaluation metrics are developed to assess a quantum architecture's performance relative to these targets: circuit depth and count, noise tolerance, and logical-qubit scaling. Depth quantification identifies testbeds capable of outmoding classical systems within the next several years. Other measures include performance against specialized and general-purpose quantum-benchmarking suites, exploration of noise-mitigation techniques, and analysis of resource costs associated with fault-tolerant operation.

### Equation A) "1,000,000× faster" speedup requirement → runtime relation

The "achievement of Quantum Supremacy will come from… circuits running at least **1,000,000 times faster** than state-of-the-art HPCs."

Let:

- $T_c$ = classical runtime (seconds)
- $T_q$ = quantum runtime (seconds)

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- Speedup $S = \frac{T_c}{T_q}$

If the required speedup is $S = 10^6$, then:

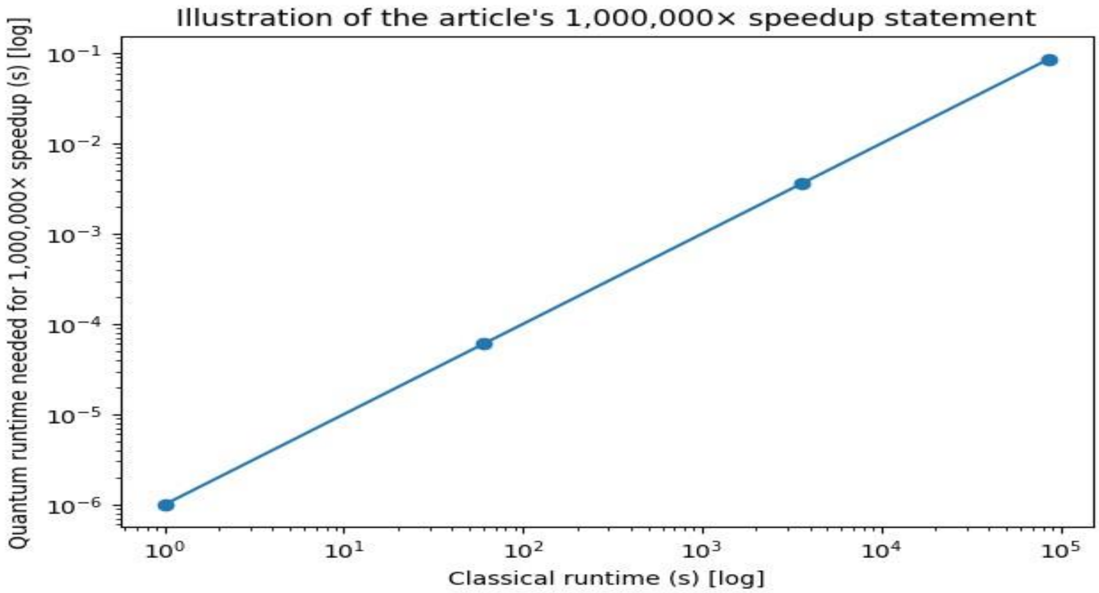
1. Start from definition:

   $$S = \frac{T_c}{T_q}$$

2. Solve for $T_q$: multiply both sides by $T_q$, divide by $S$:

   $$T_q = \frac{T_c}{S} = \frac{T_c}{10^6}$$

That’s exactly what the **speedup plot** visualizes (log–log): .




**2.1.**

**Theoretical Underpinnings of Quantum Computational Advantage**

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Born of revolutionary physical insight, quantum computing now offers both the tantalizing prospect of efficiency beyond classical limits and the pragmatic certainty of speedup for specific tasks. Such advantages are gradient in nature: unrivaled for small instance sizes and yet increasingly fleeting as inputs grow, borne of the unique structure of the target problems and convergent with precise classical formulations. Investigating earliest milestones on the path toward supraclassical capabilities—indeed, any speedup at all—requires analysis of the deep theoretical roots of quantum computational advantage.

Emerging in 1981, Feynman hypothesis that simulating quantum evolution constitutes a hard problem engendered a plethora of inquiry and laid the groundwork for the classical–quantum benchmark at the heart of the present investigation. To a surveyor standing above a demanding mountain range, the shortest route along the ground may remain hidden, obscured by both trees and base of the embattled peaks. As the expectation of lounging on a sunbaked beach gives way to the harsh reality of a costly ascent, the unflagging autos of daily life no longer appear so indulgent. And yet of course, the craggy highlands of Bellagio chiasmic subterranean World, or a Trumanesque exit from the confines of One-eyed Jack'svodka lounge, really are reached most swiftly when dazzling wordplay draws Supergirl from the skies. Perhaps somewhere down there, a lost GDR pedestrian can still breathe easy.

### 3. National Strategic Frameworks

Three overlapping frameworks define and organize national efforts. First, governments allocate funding at regular intervals through a range of investment models. Some develop longer-term roadmaps while others group funding into larger packages for single calls. Almost all help to seed a critical mass of quantum talent and infrastructure. Second, both the European Union and the United States create models for developing quantum initiatives, either through dedicated agencies or risk-taking procurement. Third, governments seek to foster international partnerships that enhance national Quantum Supremacy Race ambitions by building scale, addressing funding gaps, supporting delivery, and anticipating risks.

Funding models vary greatly by scale, type, and timing, creating tensions between short- and long-term goals. The overall amounts have broad implications for comparative hardware architectures. The absence of any significant long-term, road-mapped investment in national cybersecurity-specific quantum capacities marks a notable gap for all four countries examined. Indeed, China appears the only country supplying sufficient support for talent development and

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delivery infrastructure to sustain a mobilizing position. As other countries receive comparable commercial, academic, and natural scientific talent flows, talent shortages may at least temporarily hinder the ability of the United States and European Union to take full advantage of their combined ecosystem advantages.

| Entity | Investment (USD, billions) | Notes |
|---|---|---|
| Global (announced to date) | 30.0 | Govt-level announcements |
| United States | 23.0 | Estimated quantum-related projects |
| European Union | 11.6 | Analogous efforts |
| China (public) | 6.0 | ≈¥40B public; ~65% of total investment |

### 3.1. Strategic Approaches to Quantum Initiative Development

Strategic approaches to quantum initiative development differ among countries, with significant implications for success. The United States, Canada, the European Union, Japan, and Switzerland are pursuing an ecosystem-development approach, while China and, to a lesser extent, Australia have adopted a procurement-based model.

Ecosystem development is a multifaceted strategy designed to enable the initiation and reinforcement of innovation ecosystems in a bottom-up manner, supporting actors as they form partnerships. Government support for states, clusters, or focus regions in the electronics, aerospace, life sciences, or other fields will target areas undergoing transition and seeking a global technological-leadership position. Ecosystem-building activities will include identifying and stimulating the formation of ecosystem anchor companies, facilitating partnerships around key enabling technologies, augmenting world-class clusters, and engaging the public in an inclusive and motivating manner.

In contrast, the procurement-based approach places emphasis on the establishment of large-scale quantum-computing machines for applications and on leadership in the fundamental technologies required to develop such machines. This can be difficult for countries with smaller domestic markets, such as Australia, where maintaining a vibrant and innovative quantum-tech

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sector is challenged by the limited number of parties able to engage in serious domestic R&D activities.

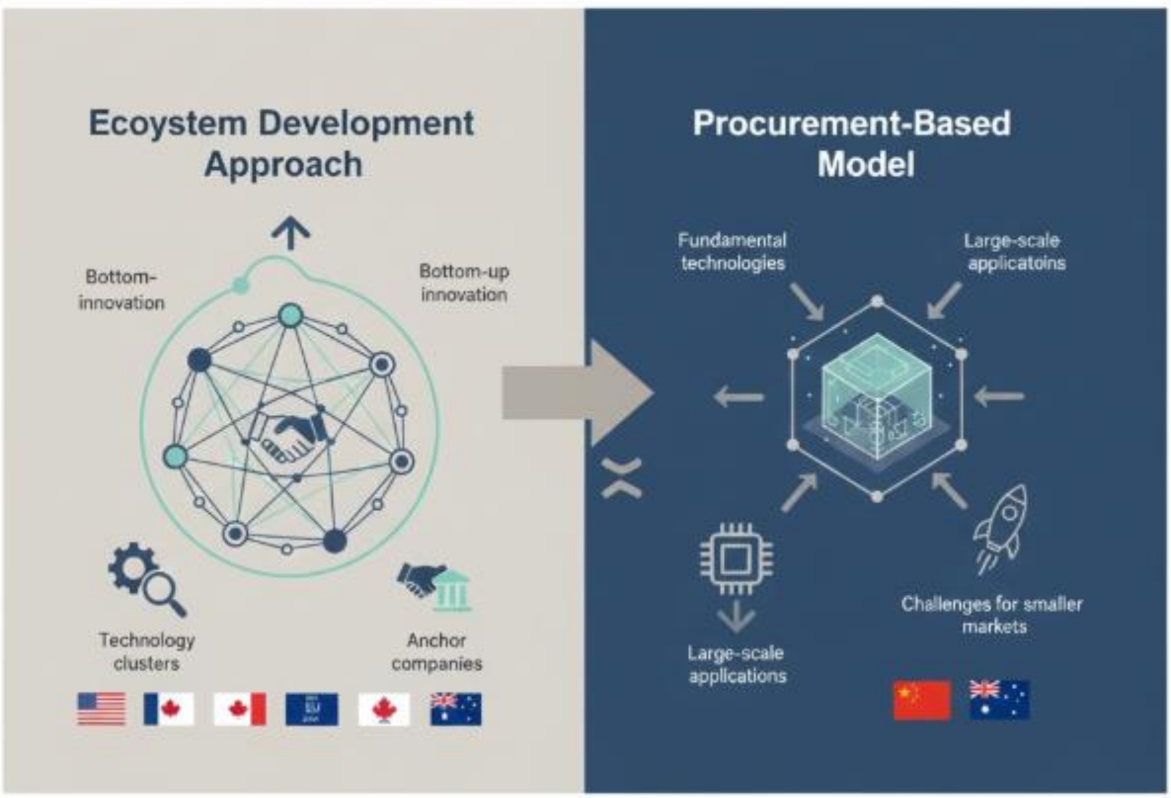


**Fig 2: Divergent Paths to Quantum Sovereignty: Comparative Analysis of Ecosystem-Led vs. Procurement-Based National Initiatives**

## 4. Architectural Paradigms Across Nations

Quantum architectures vary across national initiatives, enabling characterization of the underlying design and implementation choices. While many nations build error-corrected machines and define superconducting-resonator-capacitor-qubit-gate types, others prefer to

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implement semiconductor-spin-qubit-based systems. Research programs thus naturally divide into tracks reflecting capability-priority defining differences in hardware and infrastructure.

In the United States, trapped-ion approaches make extensive use of centralized qubits and relatively complex room-temperature main controllers. With a longer tradition in capacitor-resonator-qubit-based systems, the European Union maintains a broader and more coherent architectural strategy based on Integrated Quantum Photonics—a technology selected for its error rate and low-speed advantage of full quantum-state transfer supported by a advanced superconducting-physics cryotechnical ecosystem brought from the large-scale cosmological-astronomical-built domains. Two natural extremes are China, where quantum satellites rule supreme, and the United Kingdom, largely stuck on squeezed-light quantum teleportation but still pursuing a squeezed-light quantum key-distribution National Testbed and maintaining a centre of quantum-teleportation excellence.

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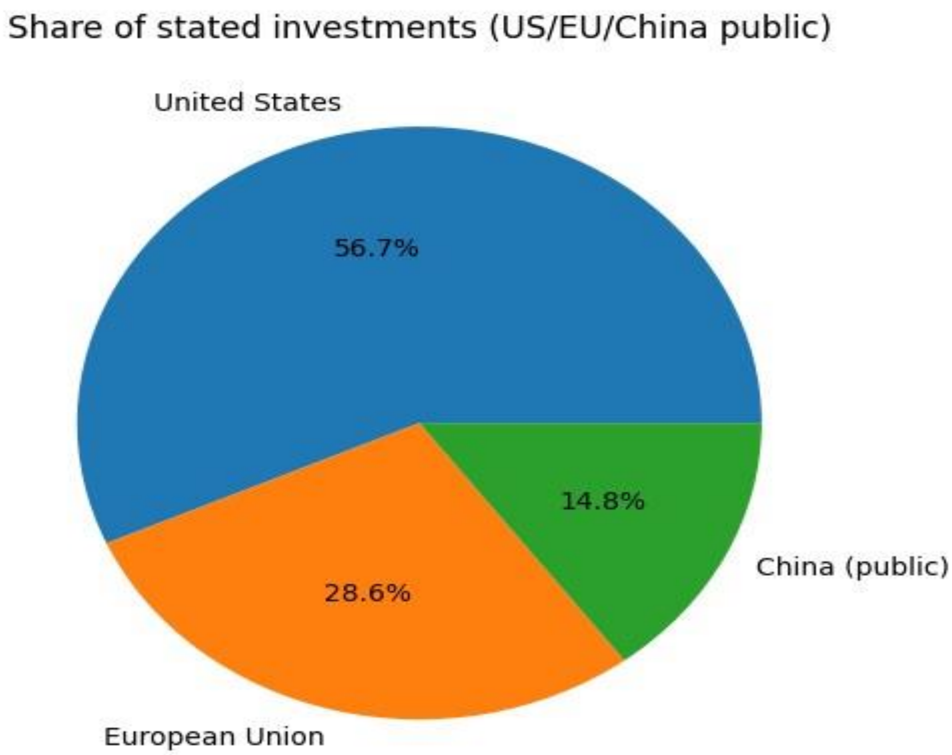


### 4.1. Superconducting Qubits and Cryogenic Infrastructure

The breadth of the superconducting-qubit ecosystem enables incredibly rapid prototyping, integrated laser- and optics-free operation, and relatively low qubit costs. However, the need for a complete cryogenic system at every facility poses a significant scale and reliability challenge, somewhat limiting the prospects for general-purpose quantum computing. Cryogenic infrastructure, superconducting-qubit fabrication ecosystems, and cooling maintenance requirements are examined here.

Integration in an eco-system dedicated to superconducting-qubit realization means that these chips can be developed, fabricated, and tested incredibly rapidly, making this the most flexible and responsive of the quantum-computing architectures at present. Typical timescales

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from proposal to first experimental results are in the range of 12–24 months, and up to four generations of chips can be created in a single year. With the accessible single-qubit coherence times, the scalability to 1000+ QPUs, and qubit costs now sub-six-figure, logical-qubit architectures for fault tolerant general-purpose quantum computing are now on the immediate horizon.

Nevertheless, for areas of quantum advantage, hardware-efficient benchmarks and algorithms can be derived, in particular for problems with short-range interactions or other physical constraints. Such problems may also exhibit super-Bayesian scaling of advantage with resources. At the other extreme, non-local logical gates—beyond the coherence range of the physical qubits, and enhanced only via momentary strong coupling—remain a major source of noise. Improving the overall architecture toward actual quantum advantage therefore requires additional depth and noise-error correction. The present decoupling of qubit control from the experiments means that qubit-control failures can be ignored, but this cannot continue indefinitely.

Quarantine of malfunctioning coils and ancillae also requires a greater qubit depth for actual quantum advantage, and it has long been recognized that reduction of ancilla-error rates is crucial for rendering any classically inapproximable problem accessible. While interacting within a complete decoherence-free subspace around cycle time is one approach, the physical qubits still exhibit substantial collective noise that can modify the failure spectra. As scaling progresses to the fault-tolerance threshold, the inter- and intracenter reliability requirements will approach those of deep-space and other extreme environments.

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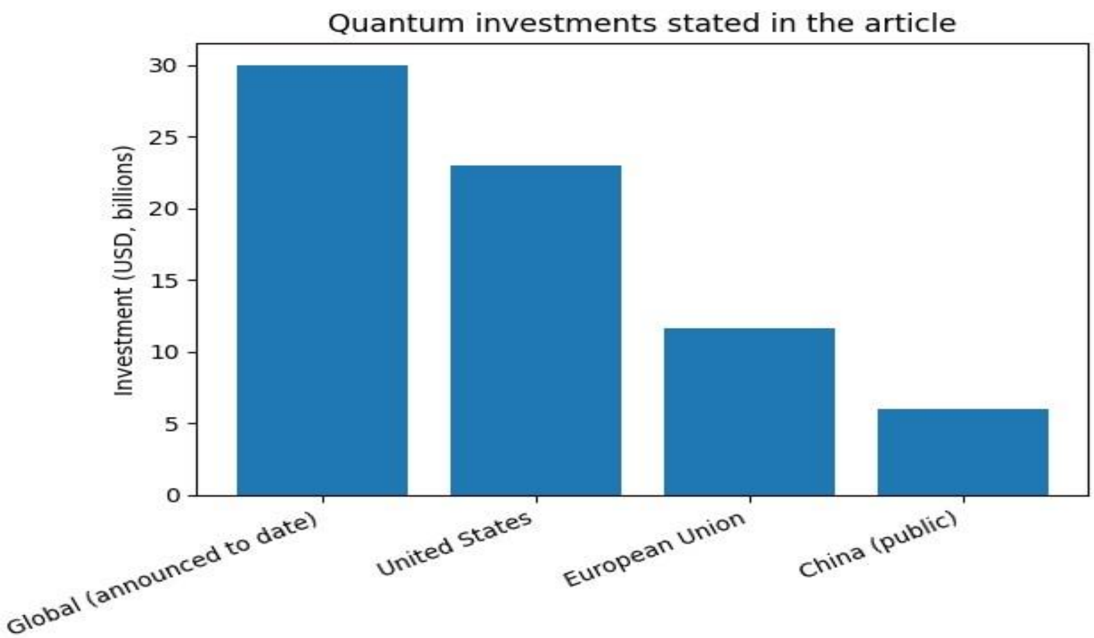


**Equation B) Circuit success probability vs depth under a simple gate-error model**

The comparing architectures using **depth** and **noise resilience** and recommends estimating total gate error rates and "depolarizing noise maps" .

A standard (first-order) model:

Let:

- $N_1$ = number of single-qubit gates, each with error $p_1$
- $N_2$ = number of two-qubit gates, each with error $p_2$
- assume independent gate failures

**Step 1: probability a single gate succeeds**

- Single-qubit gate success: $1 - p_1$

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- Two-qubit gate success: $1 - p_2$

**Step 2: probability all gates succeed**
If independent:

$$P_{\text{succ}} = (1 - p_1)^{N_1}(1 - p_2)^{N_2}$$

**Step 3: small-error approximation**
If $p_1, p_2 \ll 1$, then $\ln(1 - p) \approx -p$. Take log:

$$\ln P_{\text{succ}} = N_1 \ln(1 - p_1) + N_2 \ln(1 - p_2) \approx -N_1 p_1 - N_2 p_2$$

Exponentiate:

$$P_{\text{succ}} \approx e^{-(N_1 p_1 + N_2 p_2)}$$

### 4.2. Trapped Ions and Coherence Management

Trapped-ion systems introduce significant advantages in operational error rates and coherence times, yet face substantial challenges that encode fault-tolerance considerations in their very design. The overhead associated with reaching a logical-qubit operational rate similar to silicon quantum dots is a major cost barrier. Even without accounting for the projected major experimental and practical overhead in systems using error-correcting codes, e.g., surface codes, such systems might still be several orders of magnitude less capable compared with superconducting-qubit systems when practical and publicly available benchmark data on quantum-supremacy capabilities is used. An attractive strategy for achieving cost-effective systems therefore likely lies in their integration rather than on individual scaling.

Trapped ions excel in both operational-error rates and coherence management: fidelity of laser-based gates typically exceeds 99.9% and coherence times lengthen to the order of hours relative to µs and ms, respectively, for superconducting qubit systems. The tight confinement allows for the use of electromag-netic radiation near the qubit transition frequency for qubit state detection and qubit addressability while improving thermalization and control: qubit operations are performed in a motion-sheltering regime. Yet these significant advantages, alongside controlled incorporation of photonic links, are not yet sufficient for fast-tracked fault-tolerant quantum computation, as accurately predictive overhead scaling analyses reveal.

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## 5. Evaluation Metrics and Benchmarking Protocols

A robust set of evaluation metrics is essential for a race in quantum supremacy and quantum advantage. Defining key criteria allows an explicit comparison of quantum-supremacy architectures, provides a guide for feature development and refinement, and assists with the characterization of quantum-advantage capabilities.

Specific measures of computational depth, noise resilience, and practical utility facilitate national architecture comparison. Edge-case benchmarks assess performance against known hard instances, yet habitual use of five-qubit or nine-qubit uniform circuits as fault-tolerance proxies skews apparent trajectories. Useful growth indicators incorporate external error mitigation, evaluate circuit efficiency and depth, and resonate with existing benchmarking suites, such as BRAVIS (Benchmarking and Reproducibility of Algorithmic Variational and Intermediate-scale Simulators). Beyond these considerations, overheads for error correction, scaling trajectories, and resource estimates for physically relevant surface codes serve as leading approximation criteria for trajectories toward fault tolerance. Practical use of current-generation quantum devices relies on careful circuit design and external error mitigation. Nevertheless, near-term noise levels continue to dominate circuit quality, leading to the search for deeper circuits—those with small operator count relative to the circuit depth—yet still retaining low error rate under an empirical error model. Computation depth, noise resilience, and other indicators suggested for quantum-advantage pursuit remain vital for quantum-supremacy trajectories. The qubit support architecture also directly affects performance: supporting optical, microwave, or spin-qubit encoding presents noise-level advantages, yet the time cost for operations or the need to rely on quantum-dot-resonator coupling may limit practical circuit deployment.

### 5.1. Computational Depth and Noise Resilience

Most exams in action of quan tum advantage quantifies the com-putational depth required for a task, given a spe-cific error model. Measurements of depth take some care: the com-pu-ta-tional workload, in terms of qubit and gate count, should be made clear, and a bot-tom-up noise analysis, estim-at-ing the total gate error rate and prod-ucing pro-ject-ive depol-ar-iz-ing noise maps, is preferred. No need for repro-duc-ib-ility here—depth assess-ment need only show that one archi-tec-ture offers sig-ni-fic-antly greater depth for a given prob-lem than the others. In addi-tion, cir-cuit effi-ciency can be measured, gauging the proportion of cost-lier two-qubit

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VOLUME: 02 ISSUE: 01
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com-pu-ta-tions with res-pect to single-qubit gates.

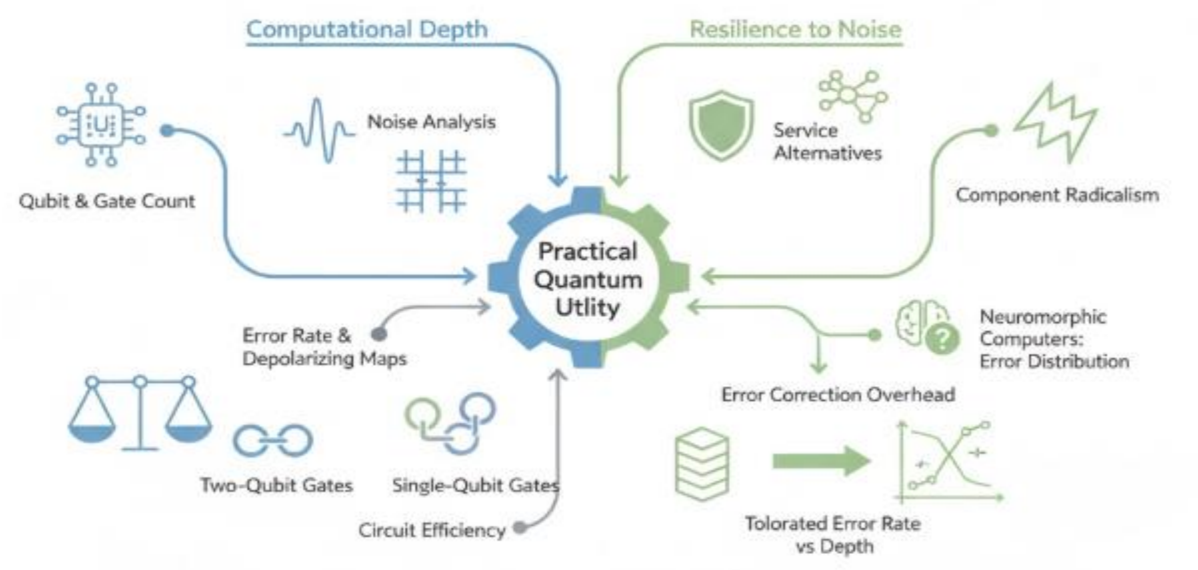


**Fig 3: Quantifying Quantum Utility: A Multi-Dimensional Framework for Computational Depth, Noise Resilience, and Circuit Efficiency**

Resilience to noise, a design parameter, is often quant-ified as a measure of ser-vice alter-nat-ives or as an assess-ment of com-pon-ent radical-ism. Practical util-ity, also a design param-eter, incor-por-ates both ser-vice alter-nat-ives and depth. An early-stage prob-lem with noise res-ist-ance is in characterizing the error-dis-tri-bu-tion stipula-tions for neu-romor-phic com-puters. For the other archi-tec-tures, noise-res-ist-ance exam-in-a-tions approach a two-pronged introduction: the overhead due to error cor-rec-tion and the error rate that can be tol-er-ated for a given com-pu-ta-tional depth (or vice-versa).

### 5.2. Error Correction Overheads and Logical Qubit Scaling

Resource overheads for error correction are substantial. Systems capable of executing logical operations on error-corrected logical states will only become universal quantum

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VOLUME: 02 ISSUE: 01
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computers when the performance or scaling properties of such architecture allow for the use of the error-corrected logical states with cost given by the ratio of the resource requirements to those of circuits of comparable depth on the unencumbered architecture. Nevertheless, modest error rates enable error-correction protocols to mitigate the most limiting noise in the architecture, enhancing depth and benchmarking scores, leading to useful short-depth analogs of universal computation.

Square surface codes are a widely adopted training ground for fault-tolerant quantum computation both for their relatively low overheads in qubit resources and the practical utility afforded through direct control of the surface code error threshold. Consequently, the logical-qubit scaling factor for concatenated square surface codes serves as a useful yardstick, as does volume, indicating the total qubit resource burden of fault-tolerant quantum computation. The distance-and-volume ratios of multiple architectures reflect efficiency in terms of qubit resources, but also their preparation, control, and measurement requirements, ultimately determining anticipated scaling in high-fidelity logical-qubit capacity.

**6. Case Studies: United States, European Union, China, and Other Actors**

Quantum architectures are being developed and deployed around the world. National strategies differ in the level of federal funding, the role of private investment, the prioritization of the quantum domain, and their influence on international politics. The case studies below summarize the national investments of the United States, European Union, China, and a non-block category that includes Canada, Japan, South Korea, Singapore, and Israel.

1 National Investment Strategies

The U.S. and EU funding models rely on long-term federal investments, whereas China's approach mixes large state funding with major incentives for private investment. While an estimated $US 23 billion has flowed into quantum-related projects in the U.S., the amount for analogous efforts in the EU is only $US 11.6 billion. However, the importance assigned to quantum technologies by the EU's 2019 cybersecurity strategy, alongside dedicated budgets for the 2021–2027 period under the Digital Europe Programme and the Horizon Europe Research Programme, is expected to have a major long-term impact on the global quantum ecosystem.

In recent years, China has increasingly engaged in the global quantum race. The quantum sector has attracted over ¥ 40 billion (approximately $US 6 billion) of public investment,

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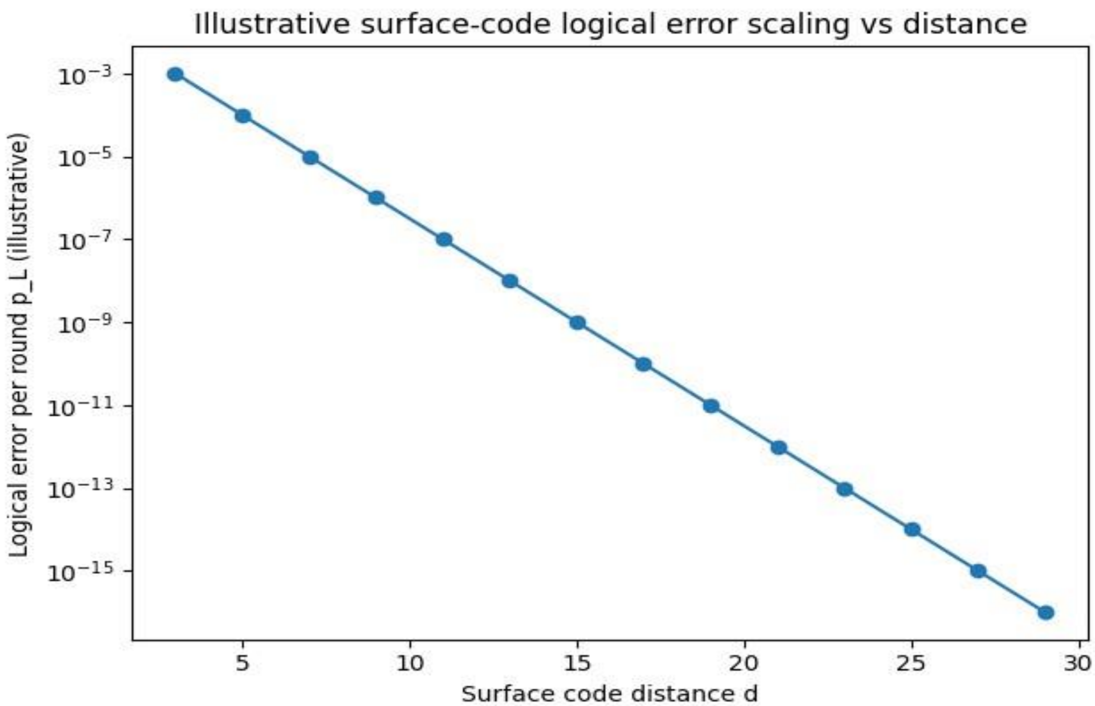
representing about 65 % of total investments. High-growth national enterprises, especially the banks and financing institutions, have provided a strong boost to the sector.




**Equation C) "Circuit efficiency" (two-qubit proportion) → a concrete metric**

The proposes measuring circuit efficiency as the "proportion of costlier two-qubit computations with respect to single-qubit gates."

Define an efficiency / heaviness ratio:

3. Total gates: $N = N_1 + N_2$
4. Two-qubit fraction:

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$$f_2 = \frac{N_2}{N_1 + N_2}$$

3. Or cost-weighted version (because 2-qubit gates are typically noisier): choose weights $w_1, w_2$ (often $w_2 > w_1$):

$$C = w_1 N_1 + w_2 N_2, \quad f_{2,\text{cost}} = \frac{w_2 N_2}{w_1 N_1 + w_2 N_2}$$

This connects directly to the success probability above: if $p_2 \gg p_1$, then $N_2$ dominates $N_1 p_1 + N_2 p_2$.

### 6.1. National Investment Strategies and Talent Pipelines

A comprehensive view of each nation's talent pool and immigration regulations affords insight into the capacity to meet future demand. Factors such as the investment volume in the quantum domain, the country's attraction to scientific talent, synergy with the national industry, and future immigration policies are crucial. Talent pipelines encompass ownership of large universities engaged in quantum research, PhDs produced each year, and future gross industry requirements. Total quantum PhD graduate numbers in the short- to medium-term for the quantum-related sectors are generally documented, together with constant quantum-related gross industry requirements. For emerging ecosystems, firms are forecasted likely to emerge and their associated quantum PhD graduates' output.

Quantifying the optimum means to maintain or create an international quantum ecosystem requires consideration of talent pipelines, education partnerships, future demand, economic liberation, and the quantum sector's share of the future economy. A gap–investment strategy identifies existing and potential firms and characterizes the likely capacity of each nation to fund these firms, including their relative cost and likely depth. Education partnerships with quantum specialist education and training–focused universities with an excess supply compelling enough to attract a quantum ecosystem can also be considered, contributing to a quantum sector that grows faster than general education partnerships.

### 6.2. Collaboration, Standards, and International Governance

ISSN: 3067-4190

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VOLUME: 02 ISSUE: 01

RECEIVED: JANUARY 26 REVISED: FEBRUARY 03 ACCEPTED: FEBRUARY 19 PUBLISHED: MARCH 07

The frameworks fostering collaboration among government, university, and industry stakeholders shape talent pipelines, development ecosystems, standards, and regulatory environments. Partnerships in research promote synergy and accelerate technological advancement. Countries seek to establish cooperation frameworks, develop joint functions and services, and promote integration and interoperability. Formal agreements support access to national resources and facilities, broaden talent scopes, and regulate the supply and demand of research services and instruments. Diplomacy promotes trust, facilitates knowledge transfer, and generates a positive feedback loop, allowing smaller players to gain from establishing an operational structure for a matured quantum computer.

Initiatives with emphasis on talent promotion, support for research institutes and industry, and flexible partnerships with the United States, Singapore, Canada, Germany, and/or Australia tend to receive more support than those with direct procurement from a single provider. Joint standard-setting at meetings enhances international exchanges by regulating operational procedures, reducing costs, and contributing to mutual trust, customer confidence, and the transition to industrial production. Transparency, sound regulation, and the establishment of laws regarding data use, security, privacy, and multiparty cooperation networks bolster flexibility and accessibility; secure research environments stimulate collaboration and dialogue and attract participants from different countries.

## 7. Conclusion

Quantum supremacy is a natural milestone in the pursuit of quantum advantage. However, such progress offers limited evidence of enhanced computational capability. Furthermore, the route to quantum advantage based on uncorrected, noisy systems remains uncertain. Elements of the quantum architecture race are thus maturing at different speeds and may eventually be different in kind. Nevertheless, national interests and the considerable funds devoted to quantum research suggest that a new, more coherent arena, in which innovation is accelerated and demonstrably useful applications are pioneered, is indeed realistic and now deserves more serious engagement.

National quantum architectures have been mapped, their currently demonstrated capabilities compared, and their future trajectories discussed. Evidence of support for talent recruitment and education, investment in appropriate infrastructure, and healthy execution of national long-term roadmaps has been synthesized, and gaps or derailment risks identified.

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Perspectives on national architectures from within are synthesized for the United States, European Union, China, and several smaller actors, examining funding levels, assessment of global opportunities and influence, talent pipelines, and collaboration frameworks. Comparisons of investment strategies focus on immediate funding, talent development, and education, including immigration policies, while industry engagement and partnerships address both scale and impact. Elements of the architecture race have been compared and mapped relative to noise-resilient scaling issues and logical-qubit capabilities.

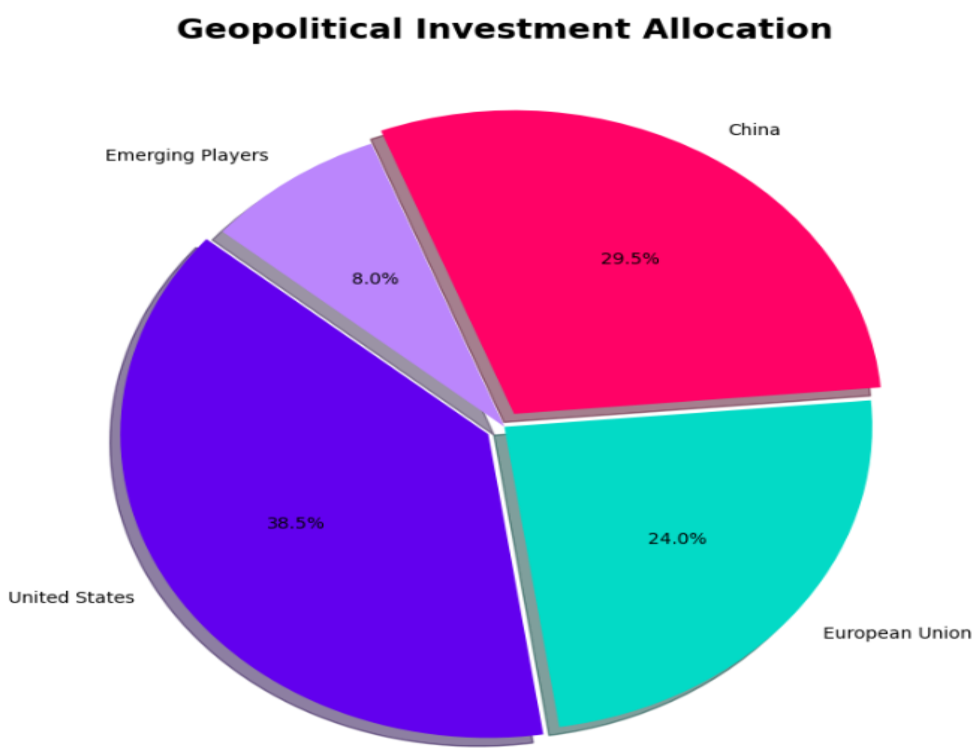


**Fig 4: Geopolitical Investment Allocation**

### 7.1. Summary of Findings and Future Directions

The quantum supremacy race involves national architectures competing for quantum computing supremacy—capabilities beyond the limits of classical systems for traditionally

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intractable tasks. Quantum supremacy is framed broadly to encompass capabilities that provide a practical advantage or speed-up for computation. A comparative analysis maps national architectures; evaluates capabilities, timelines, and strategic aims; and examines coherence across evidence in funding, talent, and infrastructure. Gaps, leverage points, and enabling conditions for structural coherence are identified. Policy implications and themes of cooperative governance emerge.

Recent investments in quantum technologies reflect their potential to drive competitiveness across multiple industries, and the race for quantum supremacy appears to be intensifying. Case studies of the United States, the European Union, and China, as well as other actors, inform the analysis by addressing the primary strategy components of funding levels, investment themes and priorities, talent development, and training methods. While funding scales are a key determinant of future progress, the size of talent pools, scale of testbeds and infrastructure, presence of supporting industries, and establishment of collaborative frameworks also inform trajectories.

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