

# Quantum Simulation Cloud Platforms

## ANMD-MRS24-239 · Quantum & Advanced Computing

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

### WHY THIS REPORT

Quantum simulation cloud platforms democratise access to quantum computing — delivering classical simulators, real-QPU access and hybrid execution over the cloud so developers can model gate-model circuits, annealing and chemistry/materials problems without owning hardware. This report is a comprehensive, decision-grade study of the quantum-simulation-cloud market across simulation type, access mode, application, end user and business model, spanning history 2020–2024, a 2025 base year, a 2025–2032 forecast and long-term outlooks to 2035, 2040 and 2050.

### SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

The sustainability case centres on access and skills. Quantum-cloud platforms widen equitable access, education and research participation while concentrating compute for efficiency. The analysis applies double materiality, maps outcomes to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, and links contributions to SDGs 9, 4 and 8. Data-centre energy of classical simulation, equitable access and responsible-innovation governance are treated as material risks — with greenwashing and SDG-washing screens applied throughout.

#### Mapped Sustainable Development Goals:

<b>SDG 9</b> Industry & Innovation	<b>SDG 4</b> Quality Education	<b>SDG 8</b> Decent Work & Growth
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**Framework alignment:** Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

### WHAT'S INSIDE AT A GLANCE

<b>53</b> Chapters	<b>9</b> Report Parts	<b>7</b> Regions Covered	<b>40+</b> Country Markets
<b>2025–32</b> Forecast Horizon	<b>4</b> Forward Scenarios	<b>25+</b> Companies Profiled	<b>3</b> SDGs Mapped

## MARKET OVERVIEW

### Quantum-cloud platforms are the on-ramp to the quantum era.

Demand is driven by enterprise experimentation, education and algorithm development, with cloud access lowering the barrier to entry. The market is read three ways — value, platforms / subscriptions and QPU-hours — and forecast under conservative, base, accelerated and disruption scenarios, with every projection resolved to the 2025 base year and each region reported separately rather than folded into Rest of World.

- North America leads access, anchored by the United States, where International Business Machines Corporation, Amazon Web Services, Inc., Microsoft Corporation and Google LLC concentrate cloud-QPU and simulator access.
- Europe builds the ecosystem, with Germany, France and Spain advancing Quise, Pasqal and Multiverse Computing alongside sovereign-cloud goals.
- Asia Pacific and Israel add tools, as Classiq, Horizon Quantum, QunaSys and BosonQ Psi extend simulation and SDK capabilities.
- Simulation type and access mode segment the value, across gate-model simulators, annealing and chemistry/materials engines, and classical-simulator, real-QPU and hybrid access.

## REGIONAL OUTLOOK

Across the seven reporting regions, the report separates access leaders from ecosystem builders and emerging adopters, profiling named country sub-markets, sovereign-cloud programmes and developer pipelines in each. North America anchors access; Europe and Asia Pacific build the ecosystem; while Latin America, Africa and the Middle East are assessed on their own merits rather than aggregated away.

Region	Stage	Lead Country Markets & Drivers
Europe	Strong contender	Germany, France, Spain — Quise, Pasqal, Multiverse Computing
North America	Market leader	United States, Canada — International Business Machines Corporation, Amazon Web Services, Inc., Azure Quantum, D-Wave Quantum Inc.
Asia Pacific	Scale engine	Singapore, Japan, India — Horizon Quantum, QunaSys, BosonQ Psi
Latin America	Emerging	Brazil, Chile — research & university access
Africa	Frontier	South Africa, Egypt — education & skills building
Middle East	Frontier	Israel, Saudi Arabia, UAE — Classiq, sovereign-cloud interest

## KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> <li>• Cloud access lowering entry barriers</li> <li>• Enterprise experimentation &amp; education demand</li> <li>• Hardware-agnostic, hybrid orchestration</li> <li>• Algorithm &amp; SDK ecosystem growth</li> <li>• Pay-per-use &amp; developer-friendly pricing</li> </ul>	<ul style="list-style-type: none"> <li>• Limited near-term quantum advantage</li> <li>• Hardware queue, noise &amp; access limits</li> <li>• Crowded platform field &amp; differentiation</li> <li>• Skills gap among enterprise developers</li> <li>• Monetisation &amp; retention uncertainty</li> </ul>

## SEGMENTATION SNAPSHOT

<b>By Simulation Type</b>	Gate-model simulator · annealing · chemistry / materials
<b>By Access Mode</b>	Classical simulator · real-QPU access · hybrid
<b>By Application</b>	Classical simulator · real-QPU · hybrid workloads
<b>By End User</b>	Enterprises · research & academia · developers · government
<b>By Business Model</b>	Pay-per-use · subscription · enterprise licence
<b>By Deployment</b>	Public cloud · private / sovereign cloud · hybrid

## TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

### PART I — REPORT FOUNDATION, DISCOVERY AND STRATEGIC INTELLIGENCE

- › Chapter 1. Scope, Methodology and Report Architecture
- › Chapter 2. Industry Discovery Summary — Quantum Simulation Cloud Platforms
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

### PART II — MARKET INTELLIGENCE, SIZING, FORECASTING AND SEGMENTATION

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

### PART III — REGIONAL AND COUNTRY INTELLIGENCE

- › Chapter 11. Global Regional Intelligence Framework
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### PART IV — TECHNOLOGY, INNOVATION AND CATEGORY-SPECIFIC INTELLIGENCE

- › Chapter 19. Technology Landscape and Architecture
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**PART VIII — SCENARIO, FUTURE INTELLIGENCE AND FINAL DUE DILIGENCE VERDICT**

- › Chapter 42. Scenario Analysis and Future Intelligence
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- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
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**COMPETITIVE & INVESTMENT SNAPSHOT**

The competitive field spans hyperscaler quantum services, hardware-led clouds and software orchestrators. Profiled players include International Business Machines Corporation, Amazon Web Services, Inc., Microsoft Corporation, Google LLC, Quantinuum Ltd, D-Wave Quantum Inc. and NVIDIA Corporation. Deal activity — hardware-access partnerships, SDK alliances and venture financing — signals a market consolidating around hybrid, multi-backend platforms. Investment intelligence spans venture, corporate-strategic, growth and infrastructure finance, culminating in a bankability assessment and investment verdict.

## KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global quantum simulation cloud platforms market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do technology and adoption shifts change value versus legacy approaches?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the category align with the SDGs and disclosure regulation?

## WHY ANMD — THE DIFFERENCE

*Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.*

- **Triangulated sizing** — every market read three ways so value, volume and installed-base views reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, conditional investment verdict.

## WHO SHOULD BUY THIS REPORT

Investors and growth funds, cloud and quantum-software providers, hardware-access partners, enterprise and research buyers, universities and national labs, policymakers and lenders, and corporate strategy and ESG teams — alongside strategic corporate planners and decision-makers.

### Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

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### Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at [www.anewmarketdynamics.com](http://www.anewmarketdynamics.com). The full detailed table of contents will be sent directly to your registered company email address.

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