

SUMMARY EXTRACT

Q-Beat: Telco quantum deployment tracker

Insights from our database that tracks deployments of quantum technology within telcos worldwide

July 2025

Executive Briefing Service

Marina Koytcheva, Research Director – marina.koytcheva@stlpartners.com

Welcome to the Q-Beat!

This is where we measure the pulse of telcos' activity related to quantum tech.

The tracker was created in July 2025 and consists of all major announcements up to 30 June 2025.

We plan to update it biannually, unless we notice a major increase in relevant activity that warrants an earlier update.

This deck summarises the insights from the database and complements the [detailed tracker in Excel](#).



STL Partners' recent reports on the quantum tech topic explain what quantum means for telcos and suggest how telcos should approach the technology

Executive Briefing Service



Executive Briefing

QUANTUM: WHAT DOES IT MEAN FOR TELECOMS?

Quantum technology is developing fast and government policy announcements are increasing. There are opportunities, and risks, for the telco sector, and you do not need to be a quantum physicist to learn what it all means.



Andrew Scott, Senior Associate Analyst | andrew.scott@stlpartners.com | July 2024

Executive Briefing Service



Executive Briefing

QUANTUM TECHNOLOGIES: STRATEGIC PATHS FOR TELCOS

With quantum technologies touching on many areas of telco business, it can be unclear where telcos should make early investments. However, there are some common priorities for telcos – and by considering a small number of strategic perspectives, decisions on next steps can be made.



Andrew Scott, Senior Associate Analyst | andrew.scott@stlpartners.com | October 2024

Note:

We also held a public webinar in October 2024. Get in touch if you would like to get the link to the recording!

Contents

- 1** Executive summary
- 2** Analysis of telcos' quantum tech deployments

Contents

1 Executive summary

2 Analysis of telcos' quantum tech deployments

It's early days for quantum tech in telcos

- Commercial utilisation of quantum technology is still in its very early days, but several large telcos have been exploring it for a few years now.
- Activity is naturally concentrated predominantly in the most advanced markets. There is particularly strong activity in South Korea and Japan.
- Most telco activity typically involves at least one – and often more – partners which specialise in quantum research or technology development.

Leader by number of quantum-related announcements



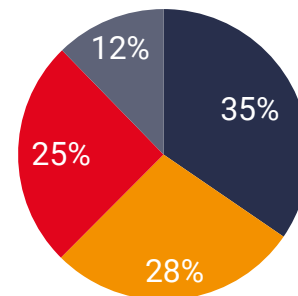
Number of quantum tech deployments or announcements by telcos

75

Number of operators engaging with quantum tech

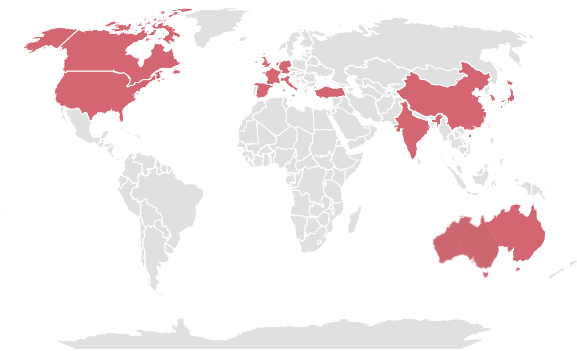
29

State of quantum tech deployments



- Announcement
- Trial or proof of concept
- Launched
- Investment

Countries with telco quantum activity



There are two types of quantum activity that we track

Creating opportunities from the development of quantum tech



Quantum communication



Quantum computing



Quantum sensing

Defending from threats resulting from the development of quantum tech



Post-quantum cybersecurity threats –
e.g., ‘harvest now, decrypt later’

Creating opportunities from the development of quantum tech dominates telcos' focus for now

Creating opportunities from the development of quantum tech

The full version and executive summary of this report is available to subscribers of our **Executive Briefing Service**

Get in touch to find out how to access this report
contact@stlpartners.com

Visit our strategy hub
<https://stlpartners.com/telecoms-strategy/>

16 quantum projects have already been commercially launched as propositions – typically for enterprises

Implementations of quantum technology in products already on the market
(share of all implementations by June 2025, n=75)

Examples of commercially launched solutions

The full version and executive summary of this report is available to subscribers of our **Executive Briefing Service**

Get in touch to find out how to access this report
contact@stlpartners.com

Visit our strategy hub
<https://stlpartners.com/telecoms-strategy/>

Questions? Get in touch!

Reach out directly to the author with your questions:



Marina Koytcheva, Research Director
marina.koytcheva@stlpartners.com