



Grenoble Alpes Ecosystem of Innovation

Presentation

Hight Tech NL

Céline Jullien, International investors relations, Quantum & Energy

March 2026

Grenoble Alpes Innovation Ecosystem



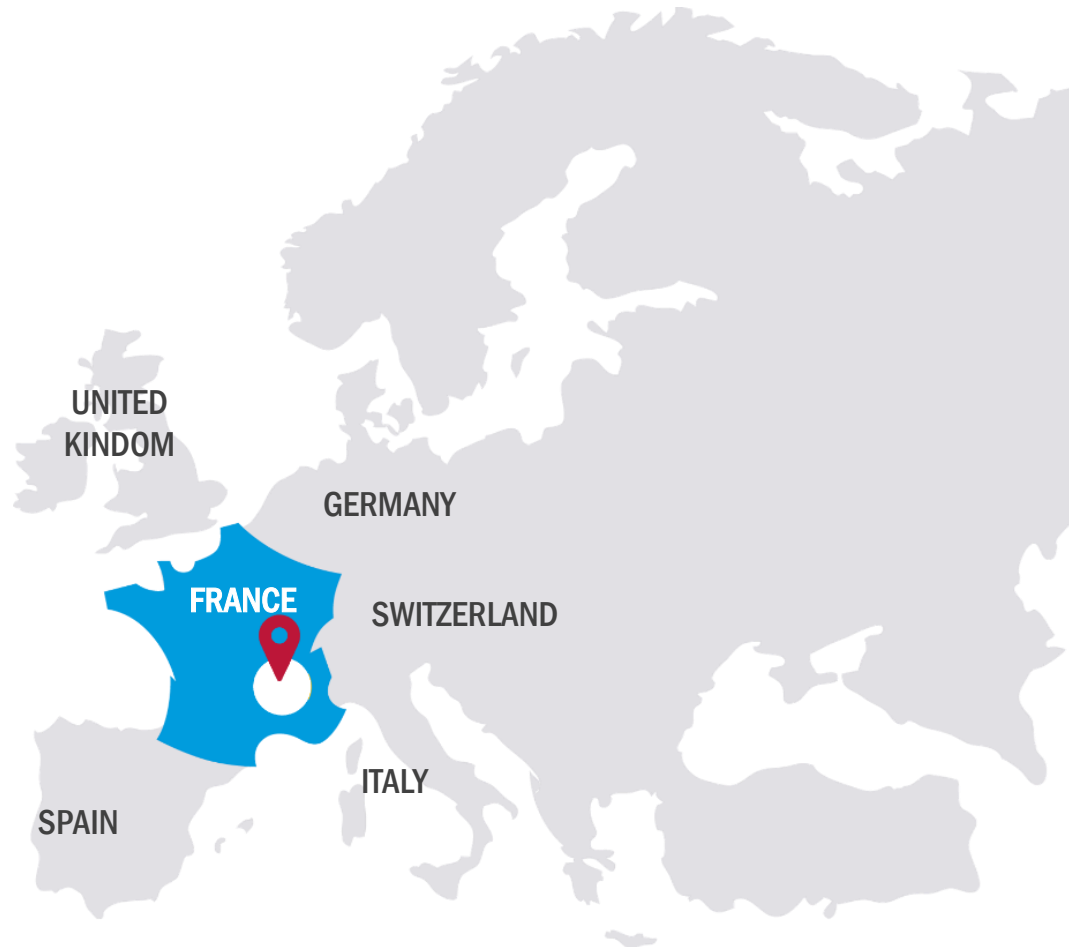
Forewords about the region and Grenoble history [4 slides]

1. A dynamic of innovation and investment *like no other* [7 slides]
2. A concentration of global players and industry [4 slides]
3. An exceptional ecosystem of innovation from science to business [9 slides]
4. A fantastic quality of life [2 slides]

Invest In Grenoble Alpes [4 slides]

Forewords

Auvergne Rhône Alpes Region : A dynamic regional economy



70 000 Km²

(THE SIZE OF IRELAND)



8 MILLION INHABITANTS

SAME POPULATION AS SWITZERLAND OR ISRAEL



#2 FRENCH REGION

12% OF FRANCE'S POPULATION



3.2 MILLION JOBS

(12% OF FRENCH JOBS)



#2 FRENCH REGION FOR GDP

€250 BILLION (GDP OF CZECH REPUBLIC OR PORTUGAL)



60 MILLION CONSUMERS

WITHIN A 500 KM RADIUS

200 MILLION CONSUMERS

WITHIN A 1,000 KM RADIUS

Forewords

Auvergne Rhône Alpes Region: An industrial powerhouse



In terms of GDP
regional wealth



#1 in France



#4 in Europe



506,000

People employed
In the region



#1
in France for
industry

Forewords

Grenoble Alpes in size



815,000
INHABITANTS



20 MILLION CONSUMERS
within a 200 km radius

2022
EUROPEAN
GREEN
CAPITAL



2nd LARGEST
ENGLISH-SPEAKING
population in France

+ 62,000
STUDENTS



+ than 30
organizations dedicated
to help entrepreneurs



+ than 750
INNOVATIVE START-UPS
launched since 2000



Easy access to
Lyon & Geneva
INTERNATIONAL
AIRPORTS

30% of waste recycled
87% valorized



#2 French research
hub in France



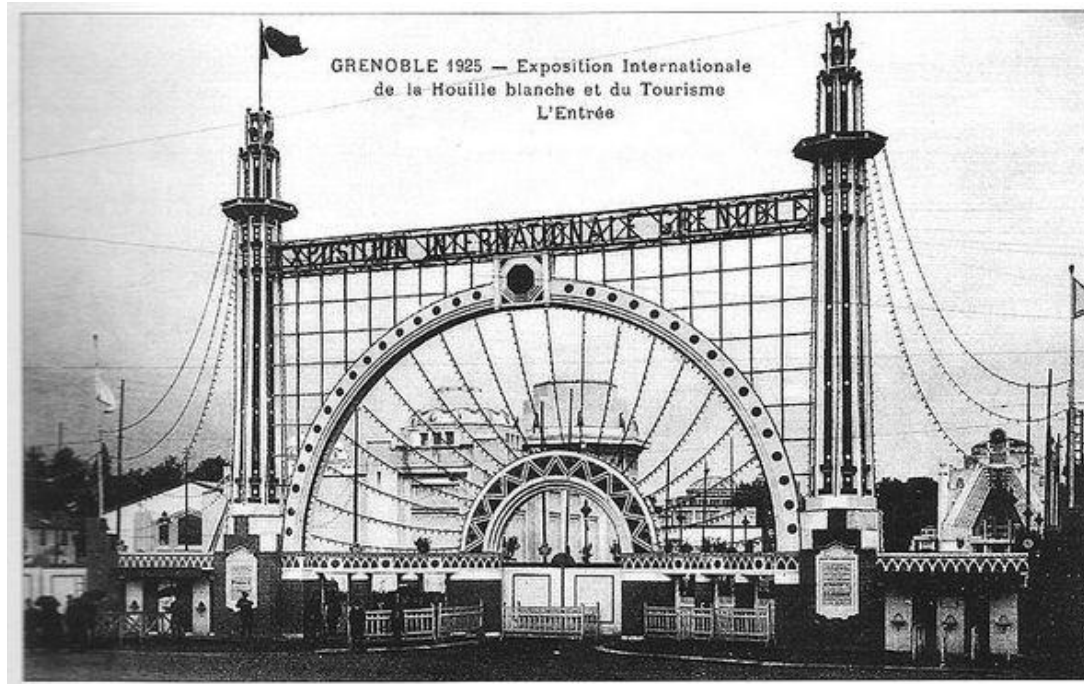
2,100 hours
of **sun** each year

Forewords

Grenoble Alpes in strategic sectors



HYDROPOWER & ENERGY



Entrée de l'exposition internationale de Grenoble - 1925 - Carte postale

MICRO AND NANOTECHNOLOGIES & SEMICONDUCTORS



Le site de Saint Egrève en 1955

A dynamic of innovation and investment *like no other* (1/7)

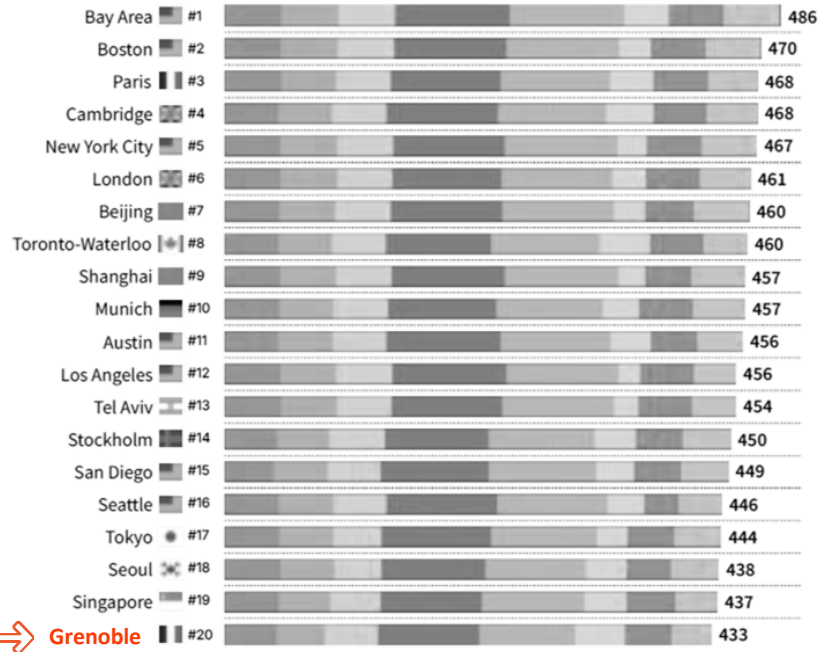
Dealroom rankings



Global Champions

SCALE LENS

20th worldwide deeptech Hub

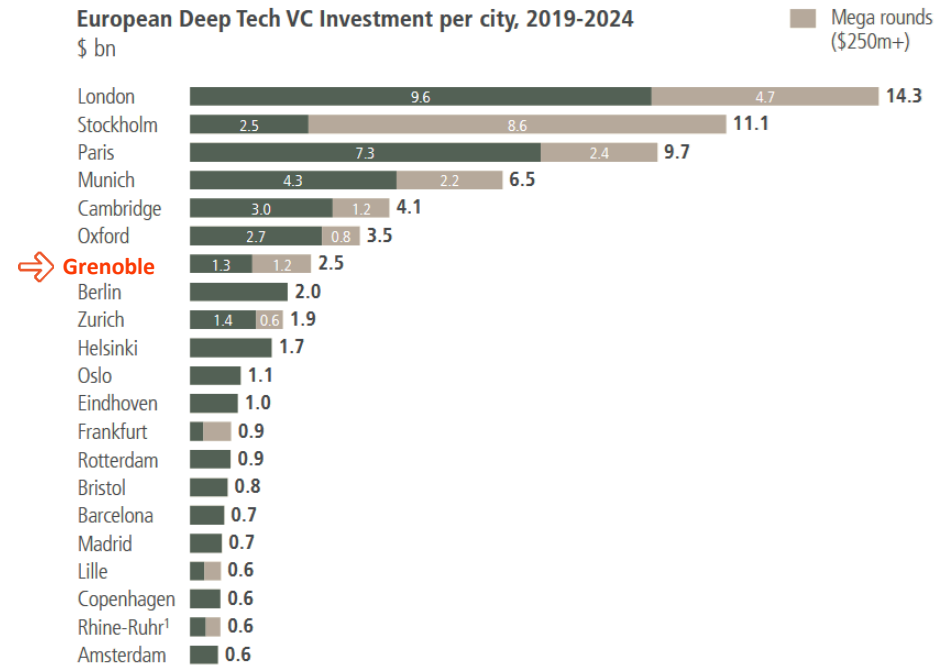


Source: Dealroom Global Tech Ecosystem index 2025

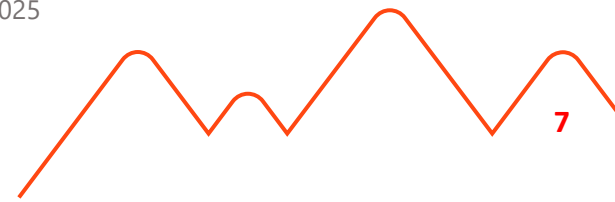
7th European City in terms of Deeptech VC investments (2019-2024)

European Deep Tech VC Investment per city, 2019-2024

\$ bn



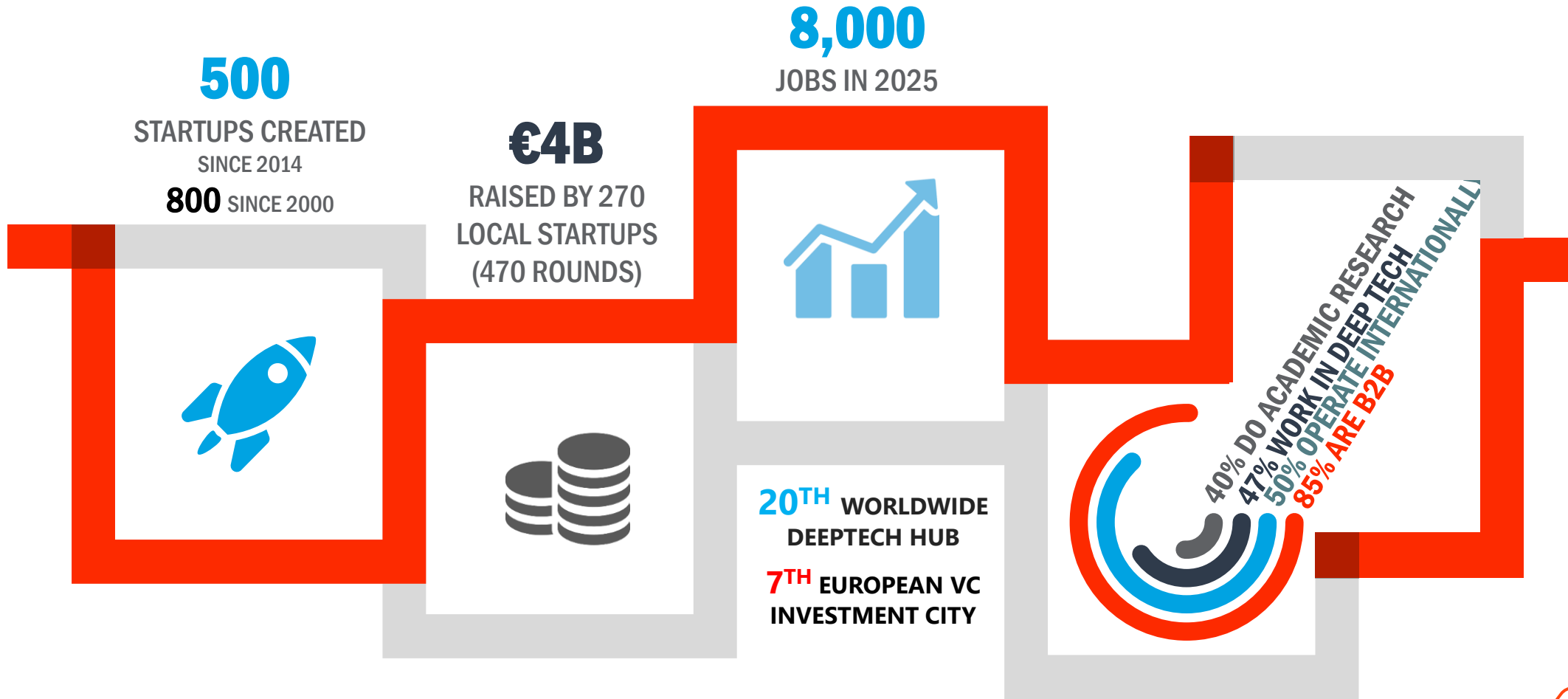
Source: Dealroom European Deeptech Report 2025





A dynamic of innovation and investment *like no other* (2/7)

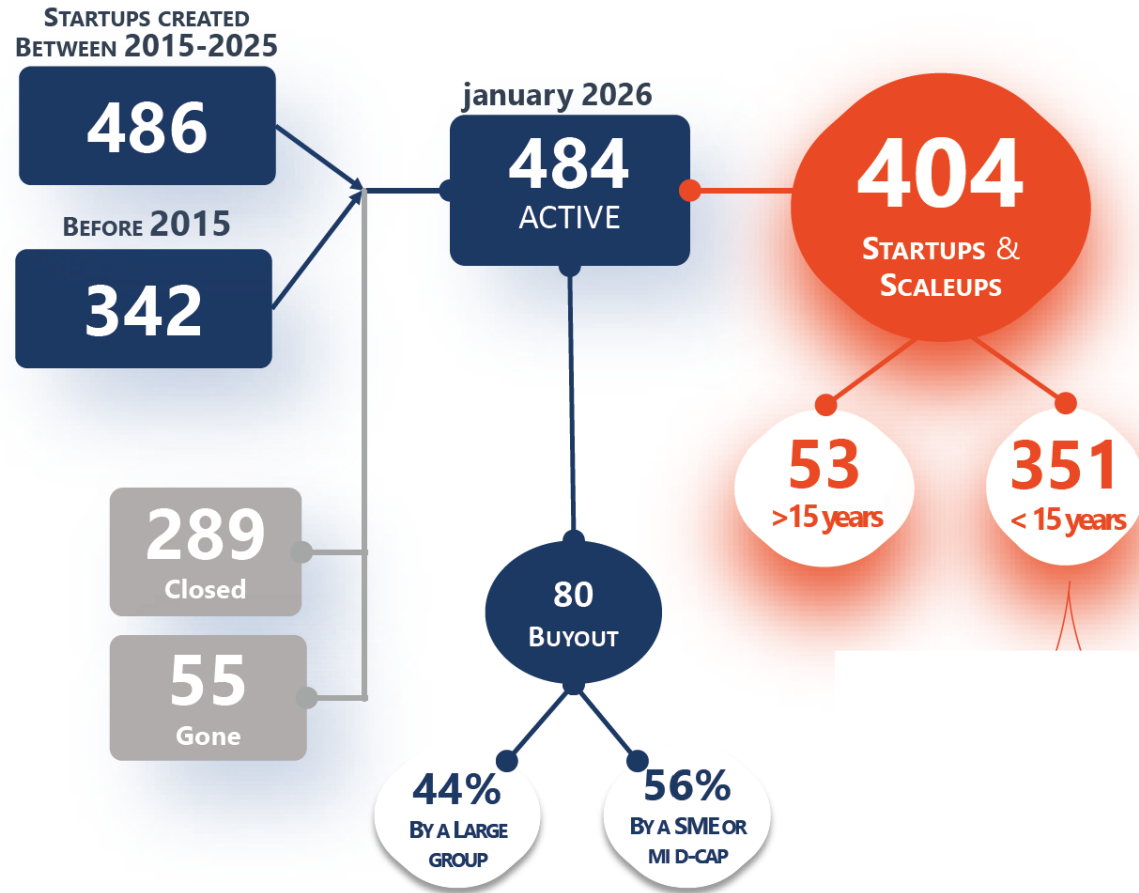
Deeptech start-ups, operating internationally & in B2B



Source: Grenoble Alpes Economic Observatory

A dynamic of innovation and investment *like no other* (3/7)

400 Startups & Scale-ups today Active in Grenoble Alpes



5-year survival rate : 60%
Startups created between 2017 and 2019
<15 years
14% Semicon
17% HealthTech
20% Digital
41% Cleantech & Energy

Source: Grenoble Alpes Economic Observatory

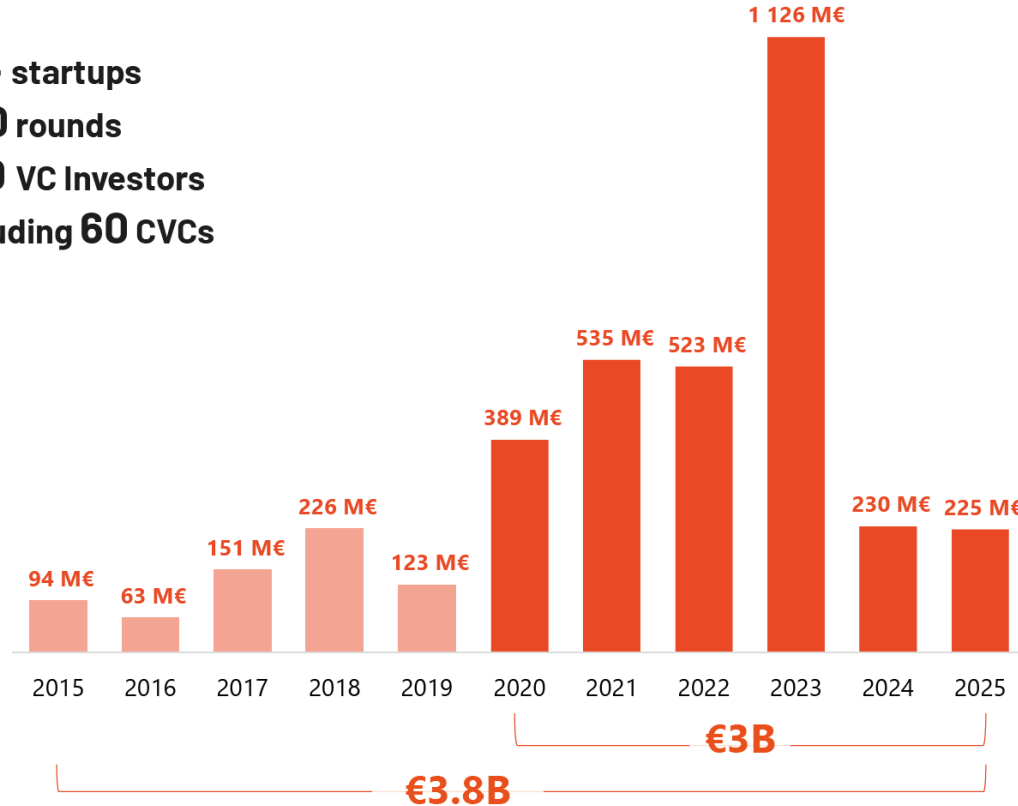


A dynamic of innovation and investment *like no other* (4/7)

3 billion euros raised overall since 2020 [85% by Deeptech Startups]



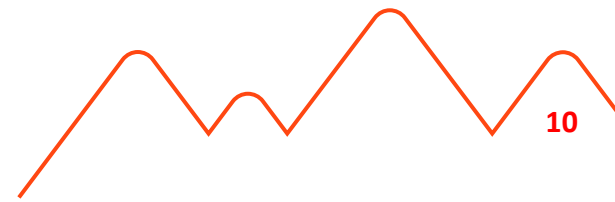
144 startups
200 rounds
230 VC Investors
 Including **60 CVCs**



TOP 10

2024	(€M)	2023	(€M)
Wattalps	11	Verkor	850
Alpinov'x	10	Aledia	120
Diamfab	8,7	Microoled	21
Lokki	6,3	Greenwave T	20
Steerlight	3,2	Quobly	19
Haventure	3,15	Befc	16
Hymag'in	2,2	Renaissance Fusion	15
My Digital Buildings	2	Caeli Energie	10
WindFisher	2	Intuiskin	9
HuntX Pharma	1,7	TOLV	6,5

Source: Grenoble Alpes Economic Observatory





A dynamic of innovation and investment *like no other* (5/7)

Portfolio of 42 start-ups and scale-ups (above 5M€ of capital raised)

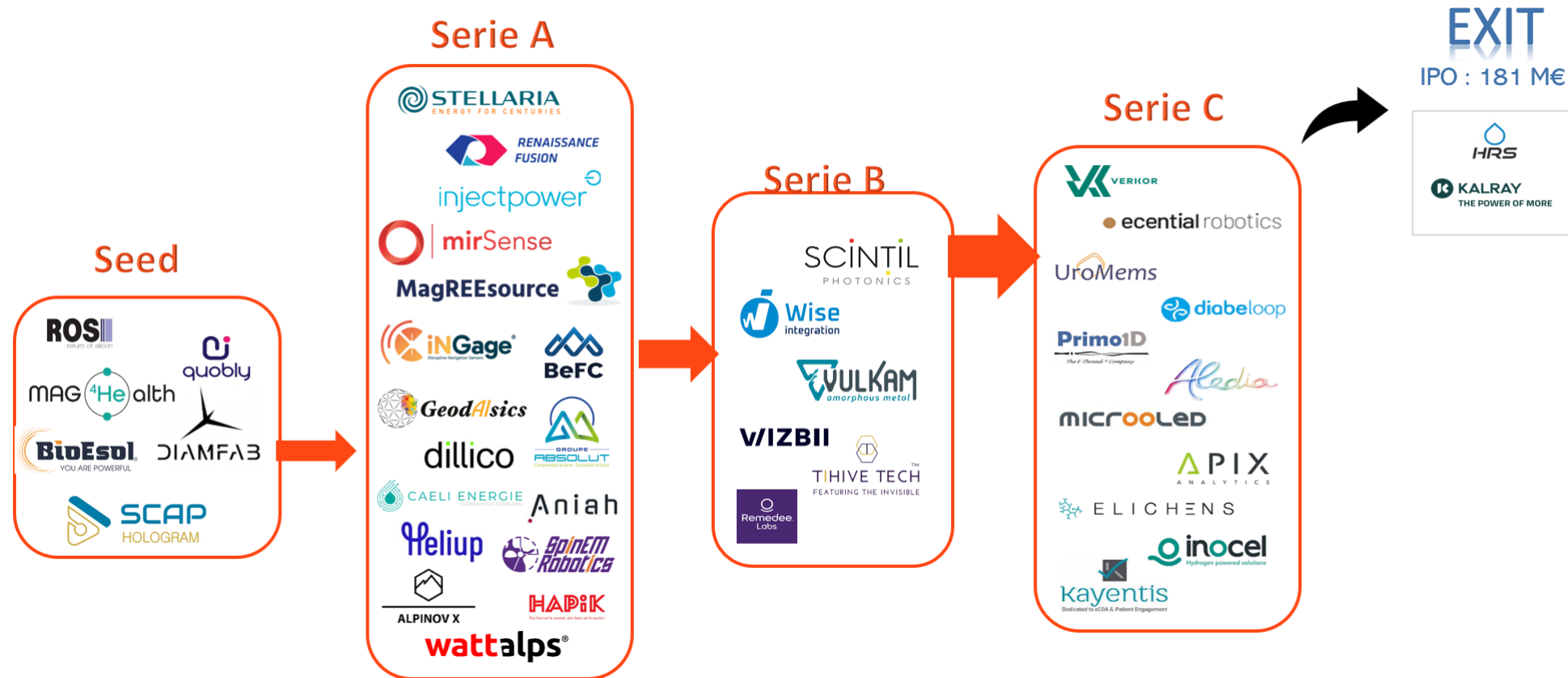


Source: Grenoble Alpes Economic Observatory



A dynamic of innovation and investment *like no other* (6/7)

150 VC & CVC, 110 rounds and 2.8B€ raised in venture capital



Source: Grenoble Alpes Economic Observatory

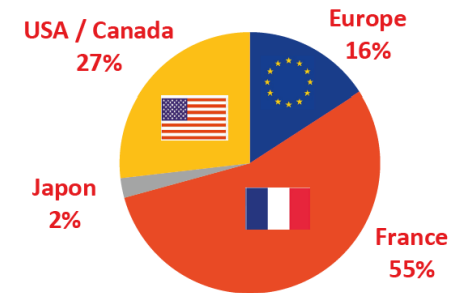


A dynamic of innovation and investment *like no other* (7/7)

Major industry leaders behind startup acquisitions



80 Startups Acquired
Startups Distributed by Buyer Company's Nationality

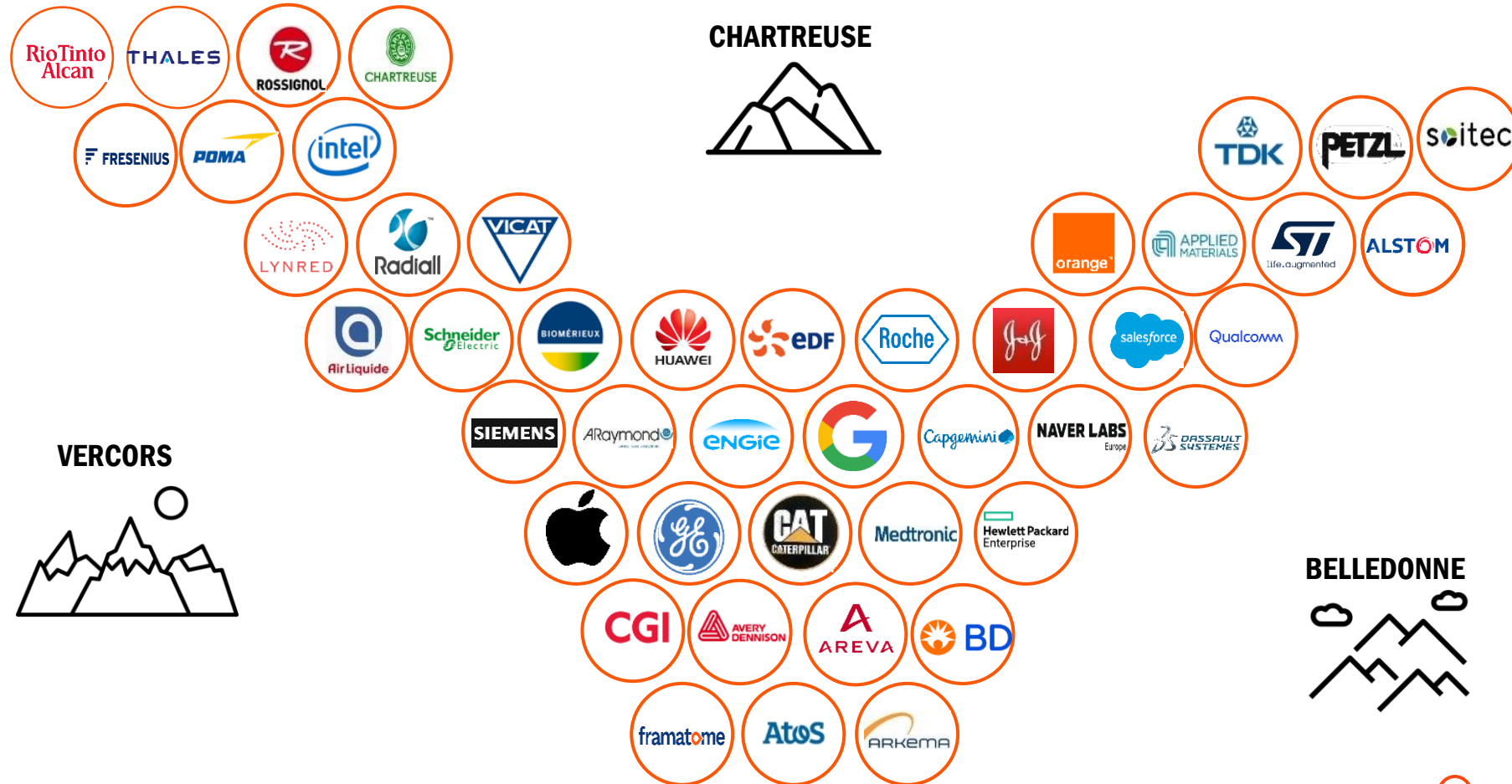


Source: Grenoble Alpes Economic Observatory



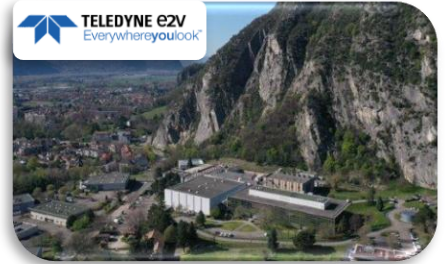
A concentration of global players and industry (1/4)

Top International leaders concentrated in a 20 km radius



A concentration of global players and industry (2/4)

Grenoble Alpes: A major hub for Industry



A concentration of global players and industry (3/4)

Famous products and technologies made in Grenoble Alpes



LIQUEUR BY CHARTREUSE
SECRET FORMULA INVENTED BY MONKS IN 1605

SMART GLASSES BY MICROOLED

CONSTRUCTION EQUIPEMENT BY CATERPILLAR

IPHONE SOI SUBSTRATE BY SOITEC
NEAR INFRARED SENSORS BY STMICRO-ELECTRONICS

EV BATTERIES BY VERKOR

CABLE CARS BY POMA

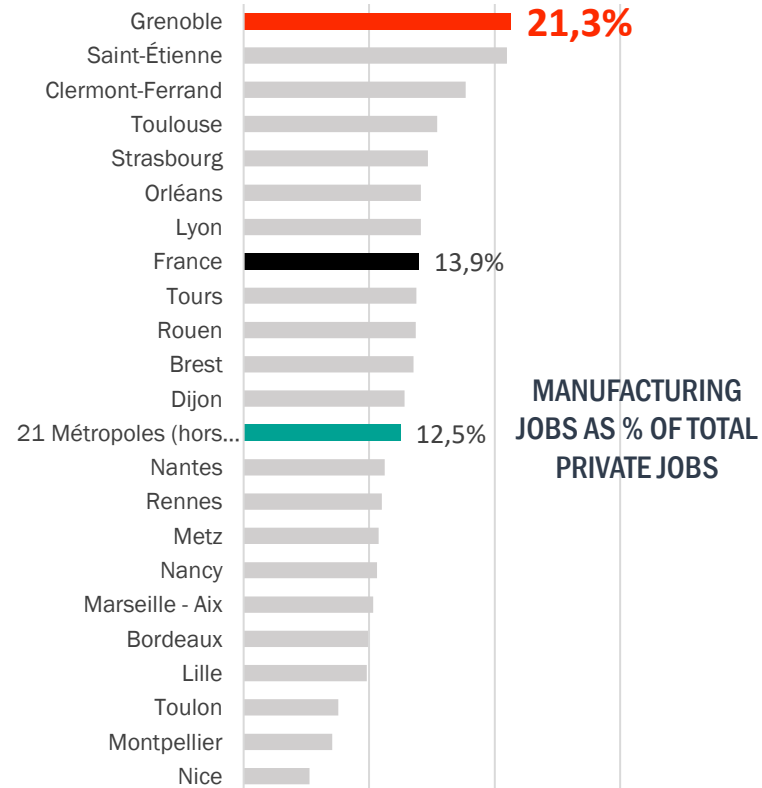
HYDROGEN FUELING STATIONS BY AIR LIQUIDE

FACTORY-MADE SKIS BY ROSSIGNOL

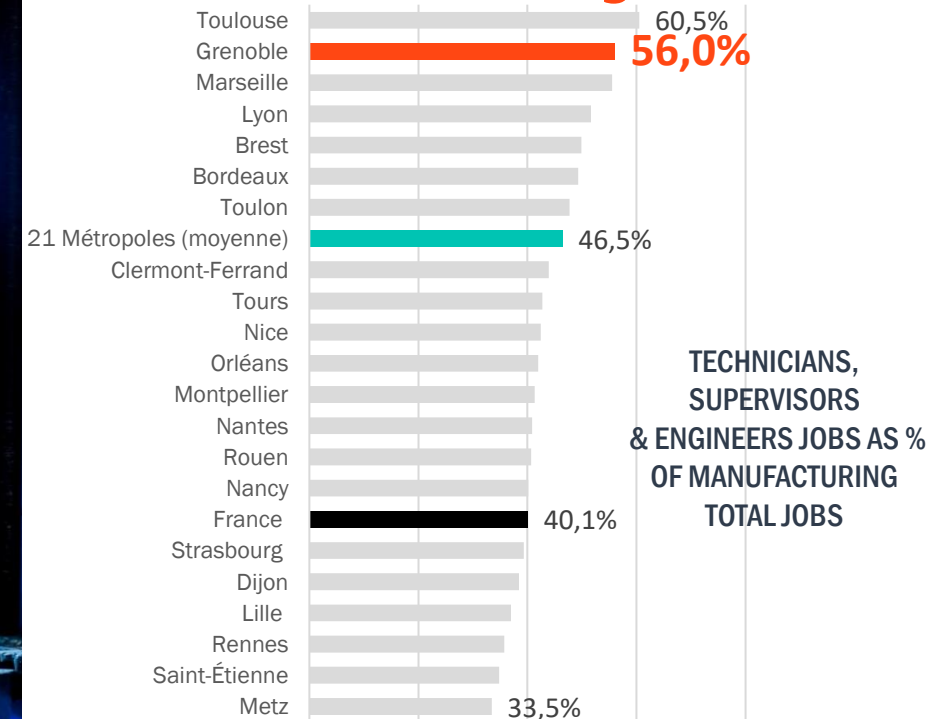


A concentration of global players and industry (4/4) Among the highest concentration of manufacturing skills in France

#1 manufacturing hub in France



#2 French city for skilled jobs in manufacturing



An exceptional ecosystem of innovation (1/9)

A unique concentration of science, technology & research infrastructures



#2 FRENCH RESEARCH HUB

1 of France's top 3
WORLD-CLASS CENTERS OF EXCELLENCE IN **AI**

#2 in France for engineers
engineers as a % of total jobs

City	Percentage
Toulouse	11.3%
Grenoble	9.5%
Paris	8.9%
Lyon	8.3%
Nantes	8.2%
Rennes	7.2%

#1 SCIENTIFIC CITY in France (outside Paris)
#75 WORLDWIDE -Nature index 2020

#1 INNOVATIVE PUBLIC RESEARCH INSTITUTE in the world (Clarivate 2025)

7.3 PATENTS per 10,000 inhabitants

#1 in R&D in France
R&D staff as a % of total jobs

City	Percentage
Grenoble	7.8%
Toulouse	7.1%
Paris	5.1%
Lyon	4.8%
Nantes	4.8%
Rennes	4.3%

#1 European university in Innovation by number of patents filed (European Patent Office 2024)
13 DOCTORAL SCHOOLS in France for **PhD** candidates

Major competitive clusters

30,000 public & private jobs in **R&D**

5 major INTERNATIONAL research facilities

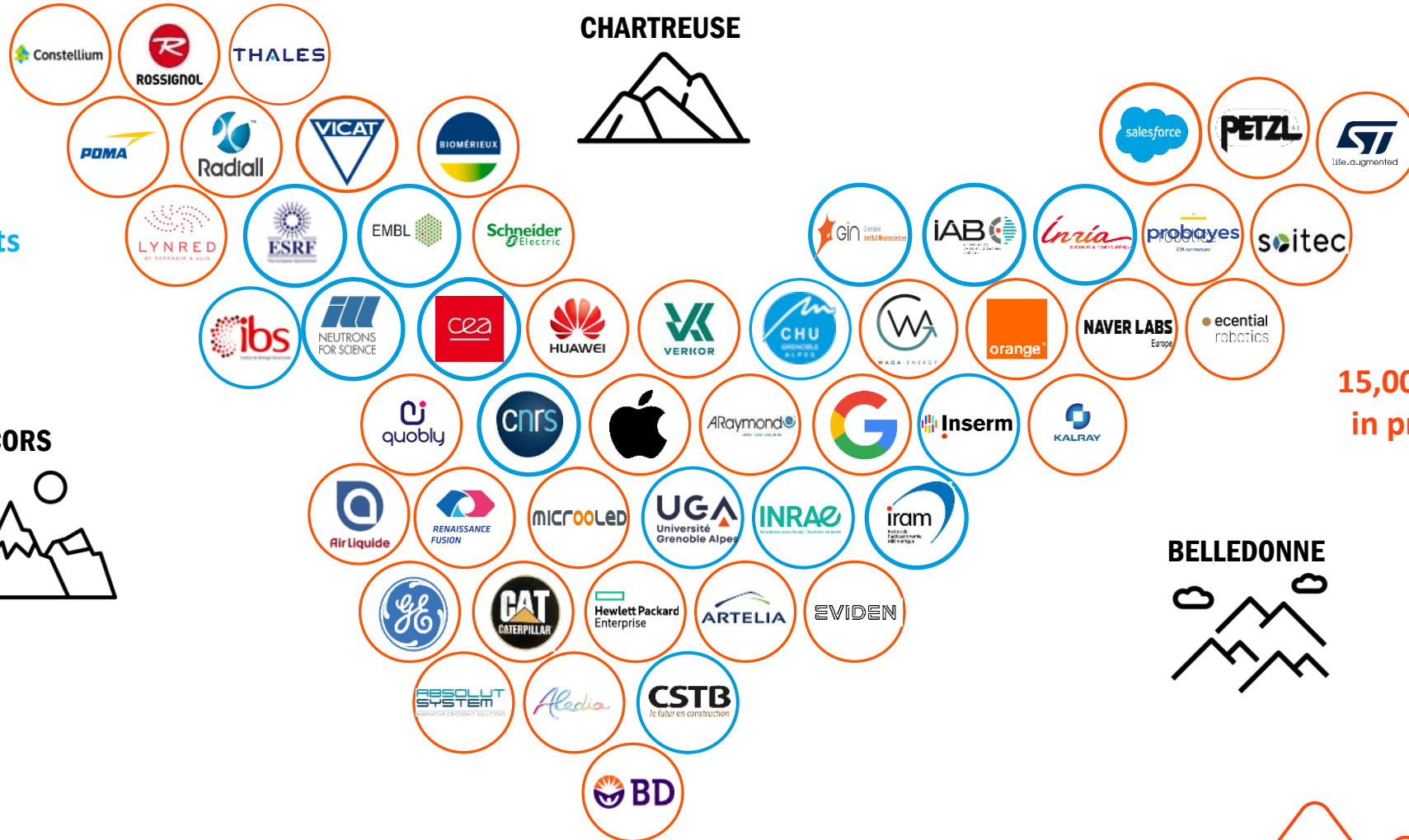
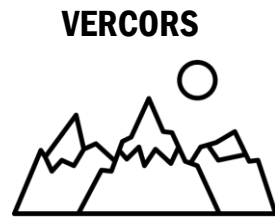
- ESRF** synchrotron research center
- ILL** neutron research center
- IRA** radio astronomy institute
- EMB** molecular biology lab
- EMF** magnetic field lab



An exceptional ecosystem of innovation (3/9)

A network of more than 30 000 public & private scientists

15,000 scientists
in public labs



15,000 scientists
in private R&D

An exceptional ecosystem of innovation (4/9)

A strong deeptech Innovation community



VENTURE CAPITAL & FUNDING



INCUBATORS & ACCELERATORS



CLUSTERS, NETWORK & EVENTS



RESEARCH & TALENTS

PUI to facilitate & accelerate innovation





An exceptional ecosystem of innovation (5/9)

Leading in the field of Semiconductors, Imagery, Display and Photonics



MINALOGIC

MINALOGIC
Auvergne-Rhône-Alpes

Global innovation cluster for digital technologies

+500 Members
2.6B R&D spending
217 Certified projects

CEA-LETI

cea leti

Technology research institute for micro & nanotechnologies

1,900 Researchers
300 Active contracts with industry partners
€450M Annual budget



IRT NANOelec

NANOelec

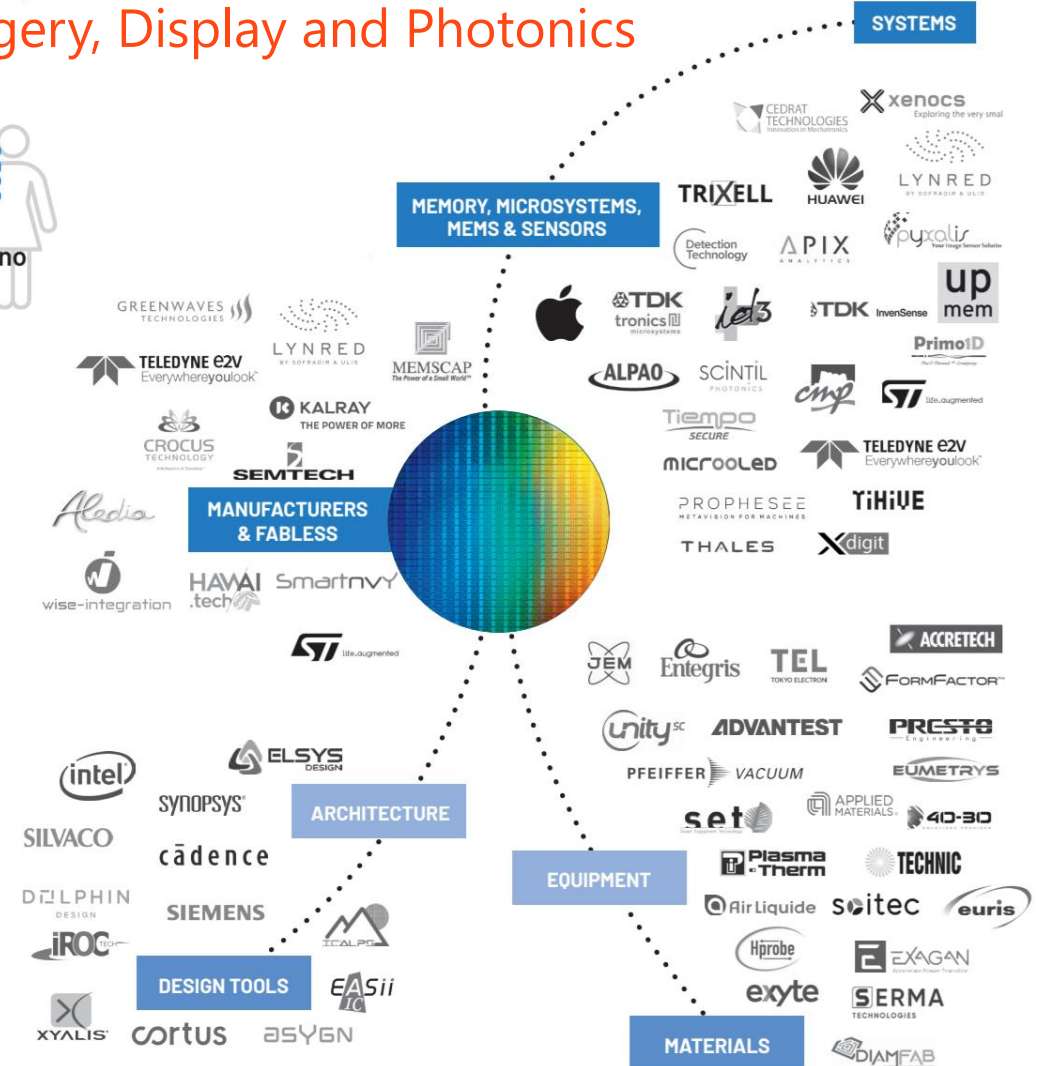
Renowned global hub for research and innovation in microelectronics

€53M Average annual budget
235 Patents filed since 2012
311 Associated & core partners since 2012

UGA & GRENOBLE INP PHELMA

UGA Université Grenoble Alpes
INP PHELMA Grenoble UGA

One of the world's **TOP 150** universities (Shanghai Ranking, 2023)





An exceptional ecosystem of innovation (6/9)

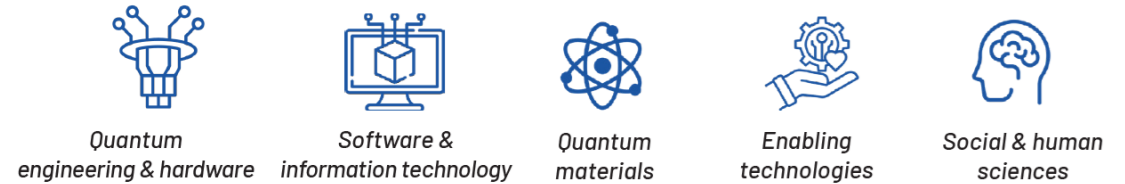
Pioneer in quantum technologies

TOP 3
French
Quantum HUB

~ 20 laboratories
dedicated to quantum
sciences and technologies

+ 230
specialized
researchers

+ 300
talents
in training



QUANTUM ECOSYSTEM OF R&D

QUANT ALPS

The ecosystem for Quantum Sciences & Technologies, bringing together Grenoble's overall research community, and animating interdisciplinary and cross-sector projects.



ALPS QUANTUM HOUSE

One of the 5 French Quantum Houses, focused on hybrid quantum computing, to guide industries across all sectors on the possibilities and development of these approaches for their business.



+ 230
permanent
researchers

+ 500
talents
trained

AN ENTIRE
COMMUNITY
DEDICATED TO THE
DEVELOPMENT OF
QUANTUM
TECHNOLOGIES

QUANTEDU-FRANCE

The National Education Program on Quantum Technologies, to meet the strategic skill requirements of research and industry in France.



CLUSTERS

Grenoble International & Interdisciplinary Institute in Artificial Intelligence focused on the future of computing.



The digital technology cluster for France's Auvergne-Rhône-Alpes region, creating opportunities for its members to innovate and grow at international level.

THE QUANTUM HUB



A foresight initiative to anticipate applications and impacts of Quantum Computing in the short, medium and long term, gathering industrial and academic partners.



RESEARCH	STARTUPS	ENABLING TECHNOLOGIES	INDUSTRIAL SCALE TECHNOLOGIES
The research federation for quantum QUANT ALPS UGA, CEA, CNRS INRIA, INP-UGA	Quantum processors based on silicon qubits QUOBLY	Innovative cryogenic systems ABSOLUT SYSTEM	Quantum processor manufacturing STMICROELECTRONICS SOITEC
Quantum technologies for advanced readout SILENT WAVES	Design & supply of microwave components RADIALL	Advanced cryogenic solutions for quantum AIR LIQUIDE	



An exceptional ecosystem of innovation (7/9)

Advanced in software, AI and cybersecurity



Public research
2,500 JOBS

Private sector
16,500 JOBS



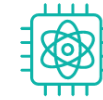
IoT & Edge Computing



Cybersecurity



Big Data



Quantum Computing

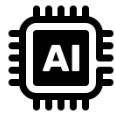


Artificial Intelligence



Digital Ethics

Value Chain Players



CEA Breakthrough, September 2025
First Hybrid Memory Technology
Enabling On-Chip AI Learning and Inference



DESIGNER OR MANUFACTURER OF ELECTRONIC OPTIMISED FOR AI



INTEGRATOR



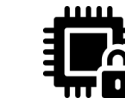
PACKAGED SOLUTIONS



CONSULTANCY & TRAINING



DEVELOPER



Cybersecurity



Cybersecurity Institute
A coordinated network of cybersecurity partners, bringing together research, academia & the private sector.



MIAI Grenoble Alpes
One of France's 4 artificial intelligence hubs, with an expertise in edge computing and the impacts of AI on society.



Quantum Grenoble
One of 3 strategic hubs for quantum computing in France, linking philosophy, physics, math, computer science, microelectronics, and the private sector.



Cybersecurity platform

1 300 m² of facilities 70 employees 5,8 M€ invested in the last 3 years 30 patents 1,1 Mloc open-source software

Higher education





An exceptional ecosystem of innovation (8/9)

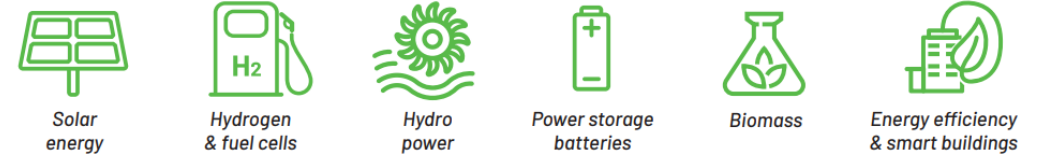
Historical pioneer in energy technologies

17,000 energy sector jobs within 20km: **the highest concentration in France!**

150 years of sustainability



Hydroelectricity
Invented in Grenoble in 1870 by Aristide Bergès. It remains a leading sector for clean energy production in the region.



SMART GRIDS

UNIVERSITÉ GRENOBLE ALPES



One of the world's TOP 150 universities

67,000 students



Engineering school dedicated to energy, water and the environment

1,200 Students

11 Partnering research labs

250 Industrial partners

AN ENTIRE COMMUNITY DEDICATED TO THE DEVELOPMENT OF SUSTAINABLE TECHNOLOGIES

TENERRDIS



Competitive cluster dedicated to the energy transition

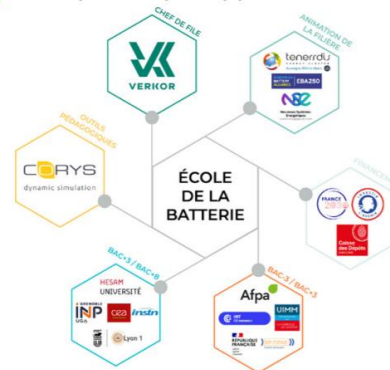
260 Members

416 R&D projects

€2.2B R&D spending

ÉCOLE DE LA BATTERIE

Training 1,600 people to work in the battery industry every year



INNOENERGY



International energy accelerator that funds & supports sustainable energy solutions with the goal of making Europe carbon-neutral by 2050

+€2B Funds raised

+500 Startups supported

The only INNOENERGY OFFICE IN FRANCE is located in Grenoble-Alpes



EUROPE'S LARGEST R&D INSTITUTE FOR SUSTAINABLE ENERGY

1000 employees

€150M annual budget

200 industry partners

+1200 patents

12 cutting-edge energy platforms: fuel cells, photovoltaics, batteries & storage, smartgrids, biomass, and more...



An exceptional ecosystem of innovation (9/9)

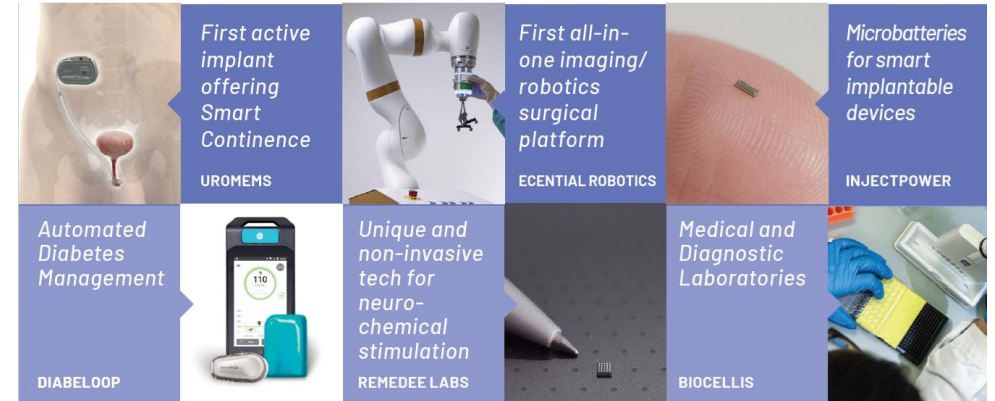
A major hub in healthcare and medical technologies

+42,000 Jobs in healthcare & healthtech

2,400 Jobs in public research

10,200 Private-sector jobs in medtech

+€M520 Raised by healthcare startups since 2017



LYONBIOPOLE

LYONBIOPOLE
 COMPETITIVE BUSINESS CLUSTER FOR INNOVATIVE HEALTHCARE TECHNOLOGIES

MEDICALPS

Medicalps
 THE HEALTH TECHNOLOGY COMMUNITY IN THE FRENCH ALPS

CLARA

CLARA
 BRINGS TOGETHER THE REGION'S ACADEMIC & INDUSTRIAL STAKEHOLDERS IN THE FIGHT AGAINST CANCER

TASDA

TASDA
 NEW TECHNOLOGIES FOR HOME HEALTH CARE & ELDERLY PATIENT CARE

ROBOTIC & DIGITAL SURGERY
 A trailblazer since the 1990s, Grenoble Alpes currently concentrates 1/2 of French jobs in the sector.



EIT HEALTH

EIT Health
 KNOWLEDGE & INNOVATION COMMUNITY DEDICATED TO EMERGING INNOVATIONS IN HEALTH



GRENOBLE ÉCOLE DE MANAGEMENT

GRENOBLE ÉCOLE DE MANAGEMENT
 ADVANCED MASTER IN BIOTECHNOLOGY & PHARMACEUTICAL MANAGEMENT



CLUSTER MIAI



AI INSTITUTE HELPING TO MAKE HEALTH CARE MORE PREDICTIVE, PERSONALIZED, PREEMPTIVE & PARTICIPATIVE

UNIVERSITÉ GRENOBLE ALPES

UGA Université Grenoble Alpes
 ONE OF THE WORLD'S TOP 150 UNIVERSITIES (Shanghai Ranking, 2024)

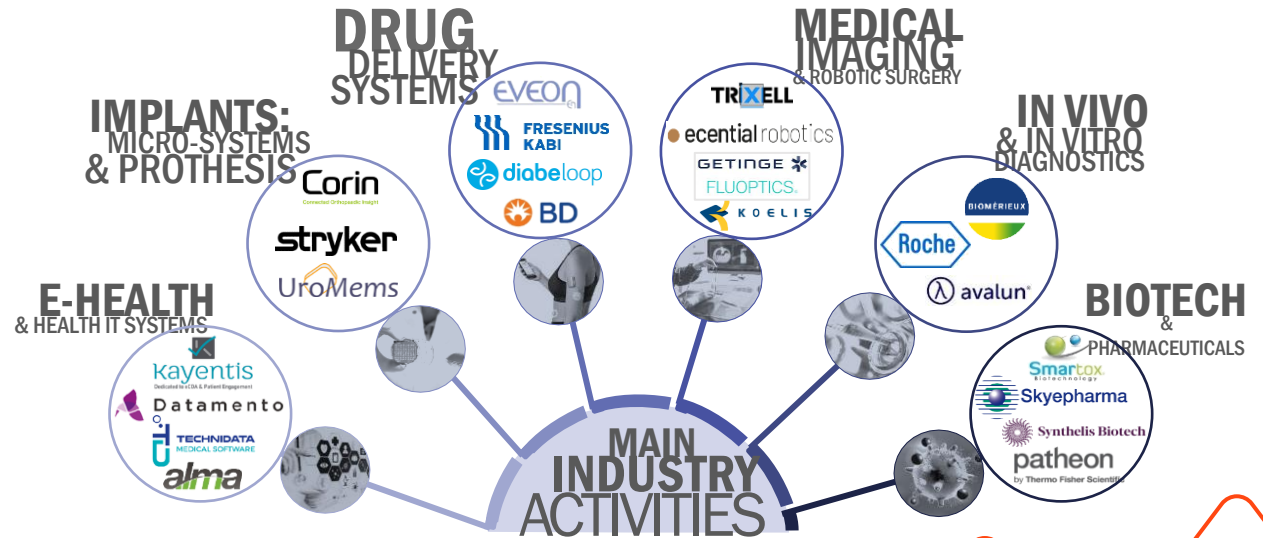
HOME TO OVER 9,500 STUDENTS IN MEDICINE & PHARMACEUTICAL SCIENCE. DEGREE PROGRAMS IN MEDICAL, BIOMEDICAL, DRUG & BIOHEALTH ENGINEERING, AMONG OTHERS...

MINALOGIC

MINALOGIC
 DIGITAL CLUSTER SUPPORTING STARTUPS IN MEDTECH & BIOTECH

MEDYTEC

MEDYTEC
 EMBLEMATIC SPACE FOR CONNECTING LOCAL HEALTHTECH STAKEHOLDERS



A fantastic quality of life (1/2)

...in numbers...



815,000
INHABITANTS



20 MILLION CONSUMERS
within a 200 km radius

2022
EUROPEAN
GREEN
CAPITAL



2nd LARGEST
ENGLISH-SPEAKING
population in France

+ 62,000
STUDENTS



+ than 30
organizations dedicated
to help entrepreneurs



+ than 750
INNOVATIVE START-UPS
launched since 2000



Easy access to
Lyon & Geneva
INTERNATIONAL
AIRPORTS

30% of waste recycled
87% valorized



#2 French research
hub in France



2,100 hours
of **sun** each year

A fantastic quality of life (2/2)

...in pictures...



Invest In Grenoble Alpes (1/4)

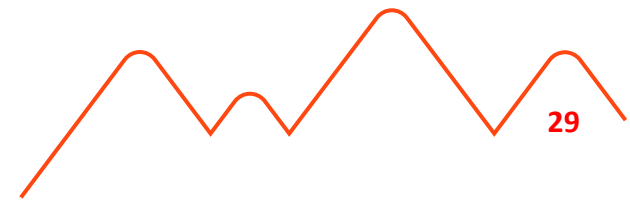
Why?



Our mission at Invest in Grenoble Alpes is
to support foreign companies to set-up and expand their business locally
to promote the local ecosystem internationally
to manage international relations



We are makers and facilitators of international development.



Invest In Grenoble Alpes (2/4)

How?



Delivering knowledge & information

to better promote and convince to set-up and expand businesses in Grenoble Alpes



Bringing intelligence

The economic observatory



Communicating regularly

The echo of the ecosystem



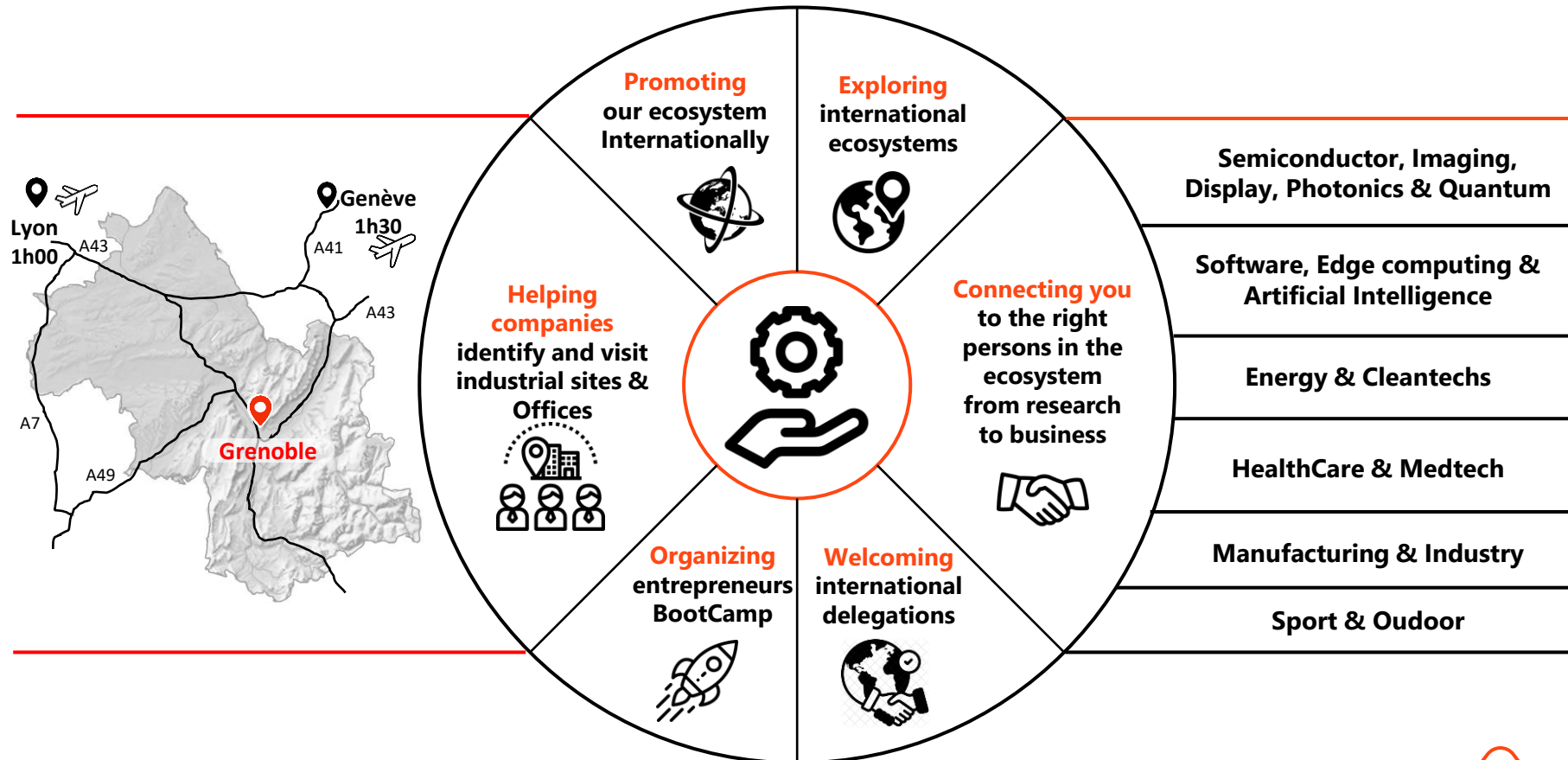
&

Invest In Grenoble Alpes (3/4)

What?



Proposing added-value services to international companies



Invest In Grenoble Alpes (4/4)

Who we are?



Nicolas Bérout
Director of Invest
& Associate Director of
Grenoble Alpes



Morgane Le Doaré
Head of the
Economic Observatory



Thomas Repellin
Communication
Outdoor Sport & Hydro



Justine Michel
Urban planning
Cleantech & Chemicals



Emilie Da Silva
Project management
& Industry field



Adeline Ciccolella
Life Science
& Medtech Ecosystem



Alexandrine Romestant
Delegations & Bootcamp
Software & AI



Céline Jullien
Investors Relations
Energy & Semiconductor

A local team working within International networks



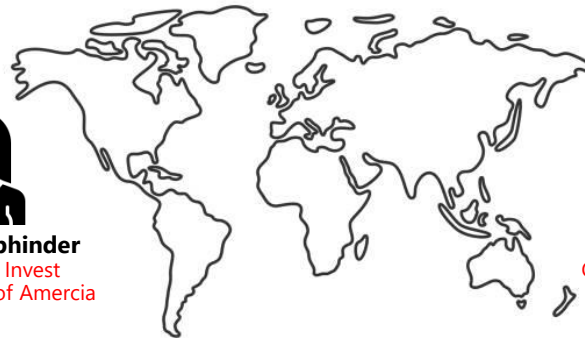
Terence Zeyer
Consultant Invest
Germany & Switzerland



Hailey Yang
Consultant Invest
South Korea



Sharon Rebhinder
Consultant Invest
United States of America



Pascal Viaud
Consultant Invest
Taiwan



