

Industry Analyst on HPE growth following Juniper Networks acquisition

Industry analyst Jeff Kagan examines whether Juniper Networks is helping HPE accelerate AI and networking growth

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/EINPresswire.com/ -- The acquisition of [Juniper Networks](#) by Hewlett Packard Enterprise ([HPE](#)) in July 2025 created a company with expanded capabilities aimed at capturing new growth opportunities. HPE recently reported its first-quarter fiscal 2026 earnings. New growth opportunities include artificial intelligence networking, data center solutions, high-performance connectivity, and other advanced technologies. Let us look at what progress they have made so far.

[Industry Analyst](#) and Strategic Advisor Jeff Kagan offers his perspective on the company's performance and what the integration of Juniper Networks into HPE could mean as the rapidly evolving AI market continues to expand.

The merger was widely expected to strengthen HPE's networking business through the integration of Juniper Networks technologies such as Mist AI, Marvis, and SRX security platforms.

If the integration delivers as anticipated, the combined company could strengthen its position as it competes with other major technology providers, including Dell Technologies, Cisco Systems, IBM, Lenovo, NetApp, AWS, Google Cloud, Supermicro, Nutanix, Pure Storage, VMware, and others.

The merger was also expected to reinforce the HPE competitive position in today's rapidly accelerating AI-driven technology landscape.

"I attended a small Juniper Networks Industry Analyst briefing in Dallas before the acquisition by HPE was announced," said Jeff Kagan. "I spent quite a bit of time speaking one-on-one with senior executives over two days. The result was that I came away both impressed and somewhat confused."



Industry Analyst



Jeff Kagan has been described as the most widely quoted analyst in the telecommunications industry."

Dick Martin, former EVP of Public Relations at AT&T

These small Industry Analyst meetings are specialized, important, intimate, invitation-only meetings where company C-suite executives present strategies, products, and financial updates to key analysts.

These meetings aim to increase awareness on Wall Street and in the marketplace, improve market perception, and attract investment. The purpose is to build trust, increase visibility, and communicate the long-term strategy beyond quarterly results. Some are more successful than others.

Rami Rahim was the CEO of Juniper Networks at that time. This is a position he has held since 2014. Today, he is the EVP, President, and General Manager of the combined HPE networking business.

"I learned quite a bit from Rahim who seemed to understand both the growth potential and the issues Juniper Networks faced," said Kagan.

"At that time, artificial intelligence had not yet become the central, named focus for every competitor and investor," Kagan continued. "Juniper appeared to be succeeding in several areas, but also seemed somewhat stretched across multiple fronts. That's why when the HPE acquisition was announced, I thought it looked like a potential win for both companies."

"Now that the merger is complete, we must wait and see whether the combined company can take a larger share of the rapidly expanding and always changing AI marketplace," said Kagan.

"While I clearly see the value Juniper Networks brings to the table, it would be helpful if HPE would provide more clarity on the tangible short-term and long-term benefits of the acquisition," Kagan added.

"Fortunately, it is still early. We should give the company time to demonstrate what the combined organization can become. That said, I like what today's HPE looks like as it competes in the fast-moving AI market."

"While I see promise, I was hoping for more clarity. Hopefully, that will come as 2026 progresses," Kagan said.

The positive news is that HPE is now strongly focused on artificial intelligence, which represents one of the most significant growth opportunities in the technology sector today.

However, the challenge is that nearly every competitor — large and small — is pursuing the same AI opportunity. There is simply a high level of noise in the marketplace today. That is

distracting to the investor, customer, worker, and the industry.

Simply describing a company as “AI-focused” does not automatically guarantee success in this rapidly evolving space. It has to be proven.

“While HPE does appear to be seriously focused on AI and networking growth, I am still looking for more in-depth color,” Kagan said.

“At this early stage, I remain optimistic that HPE can become successful in the rapidly growing and constantly evolving AI sector. We will see what happens next,” he concluded.

About Jeff Kagan

The preceding commentary is from Jeff Kagan, Industry Analyst, Strategic Advisor, columnist, and technology commentator. For more than four decades, Kagan has covered wireless, 5G, artificial intelligence, telecommunications, the Internet, pay TV, and emerging technology trends, providing analysis and projections on companies, technologies, regulations, and market shifts.

Media: This commentary may be used in coverage of this story.

Companies: Organizations interested in including Kagan in their Industry Analyst Relations program are encouraged to send an email inquiry.

Jeff Kagan is an Atlanta-based ICT Industry Analyst, Strategic Advisor, Consultant, Influencer, and Keynote Speaker who advises CEOs, CMOs, CAIOs, and senior leadership teams as they navigate the AI era.

For more than 40 years, Kagan has delivered analysis and commentary on innovation, market trends, and company performance across wireless, telecom, 5G, 6G, AI, and other high-growth sectors, serving both B2B and B2C markets.

Former AT&T Executive Vice President of Public Relations Dick Martin highlighted Kagan’s industry influence in his book *Tough Calls: AT&T and the Hard Lessons Learned from the Telecom Wars*, writing:

“Jeff Kagan has been described as the most widely quoted analyst in the telecommunications industry.”

Kagan has written thousands of columns and articles, translating complex technology trends into clear, practical insights for executives, investors, customers, and employees.

Organizations seeking guidance on becoming leaders in AI can contact Kagan at:
jeff@jeffkagan.com

To see media coverage featuring "Jeff Kagan," search on Google News and Google All.

Contact

Jeff Kagan

Email: jeff@jeffkagan.com

Website: www.jeffkagan.com

LinkedIn: <https://www.linkedin.com/in/jeff-kagan/>

X (Twitter): <https://x.com/jeffkagan>

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Jeff Kagan

Industry Analyst, Strategic Advisor Columnist

+1 770-579-5810

[email us here](mailto:jeff@jeffkagan.com)

Visit us on social media:

[LinkedIn](#)

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