

Is AI the Next Growth Engine for Qualcomm? Asks Industry Analyst Jeff Kagan

Jeff Kagan, Industry Analyst and Strategic Advisor asks, what Qualcomm of tomorrow will look like?

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/EINPresswire.com/ -- Industry Analyst and Strategic Advisor Jeff Kagan is raising a critical question for investors, competitors, employees, and the media alike: What will the [Qualcomm](#) of tomorrow look like?

Kagan believes Qualcomm has a meaningful opportunity to succeed in its next phase of growth, but emphasizes that timing and direction will be crucial.

With the global smartphone market maturing and growth slowing, Qualcomm has spent the past decade working to reinvent itself. The company has been adapting to major shifts, including reduced reliance on key customers like Apple, and expanding into new areas such as automotive and connected technologies.

Now, Qualcomm faces a new inflection point: artificial intelligence ([AI](#)).

In today's rapidly evolving AI landscape, Qualcomm competes with established semiconductor leaders such as NVIDIA, AMD, Intel, and Broadcom. At the same time, major technology companies including Google, Amazon, Meta, and Microsoft are increasingly designing their own custom AI chips. Additional competition comes from global players like Huawei, Apple, MediaTek, Samsung, and NXP Semiconductors, all vying for leadership in this fast-growing space.

Investors and customers are now closely watching whether Qualcomm can capitalize on the AI opportunity and whether it can move quickly enough to remain competitive or even emerge as a leader.

"I have followed Qualcomm's performance for a long time," said Kagan. "I have always admired their growth and industry position. However, after an extended slowdown in the smartphone sector, the key question is: what will drive the company's next growth curve? AI represents a



Jeff Kagan Industry Analyst



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*Dick Martin former EVP of
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powerful new engine.”

Kagan notes that Qualcomm already possesses strong technological capabilities, a significant market presence, and long-standing industry relationships.

However, success in AI will depend on how quickly and decisively the company executes its strategy.

Qualcomm has successfully transformed before. Founded

by Irwin Jacobs, the company began as a [wireless](#) communications innovator competing with firms such as Motorola and BlackBerry. It later pivoted into a leading supplier of chips and wireless technologies for smartphone manufacturers worldwide, an evolution that reshaped its role in the industry.

Today, however, the smartphone market has matured, prompting companies across the ecosystem to pursue new growth opportunities.

While some competitors like NVIDIA are already demonstrating rapid progress in AI, others are struggling to gain traction. The AI market remains in its early stages, but it is evolving quickly.

“Qualcomm still has a window of opportunity, but it must act decisively and quickly,” Kagan said. “One key question is whether Qualcomm will become an AI leader.”

“The AI growth wave is still forming, and Qualcomm has a chance to ride it,” he added. “By leveraging its strengths and relationships, the company can become a meaningful player in AI across wireless, telecom, and beyond. But this is not a slow-moving transition and the clock is already ticking.”

Qualcomm’s deep relationships with telecom providers such as AT&T, T-Mobile, and Verizon could prove especially valuable as these companies integrate AI into their networks and services.

History offers both lessons and warnings. Former industry leaders like Motorola and BlackBerry failed to adapt quickly to major technology shifts, losing ground to Apple’s iPhone and Google’s Android ecosystem.

Qualcomm now faces a similarly pivotal moment.

“Qualcomm absolutely has a path forward,” Kagan concluded. “The opportunity is real, but it depends on speed and precision. If the company moves aggressively into AI, it can be part of the next wave of industry leadership. If not, it risks falling behind in one of the most significant

technology transformations of our time.”

About Jeff Kagan

Jeff Kagan is an Industry Analyst, Strategic Advisor, columnist, and commentator with more than 40 years of experience covering wireless, telecom, 5G, 6G, AI, the Internet, and emerging technologies. He provides analysis and insight on companies, market trends, regulatory developments, and technological innovation.

Based in Atlanta, Kagan advises CEOs, CMOs, CAIOs, and senior leadership teams as they navigate the evolving AI landscape. He is widely recognized for translating complex technology trends into clear, actionable insights for executives, investors, and industry stakeholders.

Former AT&T Executive Vice President of Public Relations Dick Martin wrote in *Tough Calls: AT&T and the Hard Lessons Learned from the Telecom Wars*:

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