Will Blackberry Turn-Around Last, asks Industry Analyst Jeff Kagan

BlackBerry Is Reinventing Itself in the AI Automotive Software Market with QNX


Industry Analyst

NEW YORK, NY, UNITED STATES, September 29, 2026 /EINPresswire.com/ -- Industry Analyst, Strategic Advisor, Tech Influencer and Columnist Jeff Kagan comments on BlackBerry, its potential comeback and what is next for the company.

BlackBerry was a leader in the smartphone market for a decade before the Apple iPhone and Google Android rapidly transformed the industry and took leadership.

Since then, BlackBerry has spent years and worked under various leaders trying to find a new market niche. Now, thanks to its QNX software business, the company may have found a growth opportunity in automotive software and the emerging AI driven vehicle market.

While it is too early to know how BlackBerry will perform over the long term, the good news is the company is showing strength in the short term.

Its QNX software business recently reported record quarterly revenue, and BlackBerry raised its full-year revenue forecast. So far, the company's share price has also more than doubled so far this year.

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> *Jeff KAGAN, Industry Analyst*

Kagan says, the automotive software business is now a major focus for BlackBerry.

"BlackBerry has spent many years looking for its next growth opportunity, and AI and QNX appears to be giving the company that new direction," says Kagan. "The automotive industry is going through a major technology transformation, and software is

becoming an increasingly important part of the vehicle."

BlackBerry QNX software is used by major automotive companies, including Audi, Daimler, General Motors, Hyundai and Mercedes-Benz. The broader automotive industry represents a substantial and larger potential market for the company.

Today, Blackberry competes in security and enterprise software with major firms like Microsoft, CrowdStrike, Palo Alto Networks and others. Going forward they can grow further into this space and others including physical AI.

Kagan met with Blackberry leadership more than 20 years ago. They thought they were invinsible. They were wrong. An important question today is have they learned the important lessons? So far, it sounds like they have.

John Giamatteo is the BlackBerry CEO leading the company's current transformation. He joined BlackBerry in 2021 after spending six years at McAfee, where he served as President and Chief Revenue Officer.

So far, it looks like Giamatteo is just what the doctor ordered for Blackberry, said Kagan.

Giamatteo's leadership will be an important part of determining whether BlackBerry's current momentum can develop into long-term growth.

"The big question is whether this turnaround can become a long-term success," says Kagan. "Is this a real growth story? Only time will tell. I will be paying close attention to Blackberry and offering ongoing commentary on its progress and competitive positioning. I will keep you posted as I continue to learn more."

About Jeff Kagan

Jeff Kagan is an Industry Analyst, Strategic Advisor, Tech Influencer and Columnist who follows the companies and technologies transforming business and society, including AI, wireless communications, telecommunications, broadband, pay TV, IoT and related technology sectors.

As a well-known Tech Analyst, Wireless Analyst and Telecom Analyst, Kagan advises CEOs and senior leadership teams navigating the AI era and has written thousands of columns and articles translating technology trends into practical business insights.

Companies interested in speaking with Jeff Kagan are invited to send an email inquiry.

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