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World Quality Report

France

France is less mature in testing and QA than might be expected – but it's keen to make up for lost time

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France is a country that has realized that it has some catching up to do. It was late to embrace cloud-based approaches, but is placing much emphasis on these areas now. It was late, too, in agile and DevOps developments – especially in agile – and yet, in business and also in the public sector, France is making serious efforts to increase its momentum.

In testing, last year's survey showed a relative lack of maturity in France, and our impression this year remains unchanged, especially in the testing of agile developments. This is an area in which we see only little activity.

In overall business terms, over the last year we've noticed a greater predisposition to consider offshoring some service provision. This is quite a departure for France, which has little track record in this area.

The competitive imperative

One of the main drivers for change in France is the increasing competition. This is reflected in the objectives logged by French respondents in relation to testing and quality assurance (QA). French responses are the highest for ensuring end-user satisfaction, which is of course a key consideration in attracting and retaining customers. We see the same trend in response to a question about the most important aspects of IT strategy – for French organizations, every factor is higher than for our survey cohort as a whole. In addition to enhancing the customer experience, areas that stand out include security and the high quality of software solutions.

What are the greatest challenges French organizations face in developing applications? Many of them are consistent with international averages. For example, the top three are lack of end-to-end automation from build to deployment, challenges with security validation, and a too-slow testing process.

However, one notable difference is that far fewer of the French respondents report a lack of sufficient development and test environments – just 21%, against a global response of 40%. This is probably because France has a strong culture of using in-house test environments. Its organizations have invested considerably in that field, because many of them have not yet moved to the cloud.

We also see this reflected among the challenges specific to testing key applications, where only 22% of French respondents report a lack in this respect, against 32% for the survey as a whole. That said, France's main testing challenges are the same as for the rest of the world. The two most common challenges are "not enough time to test" (50% in France) and "don't have the right testing process/method" (39%).

This year, for the first time, the survey explored the proportion of digital projects using different forms of testing, and 22% of French respondents say they test before launch with real users and/or real devices. In our experience, physical device testing is indeed fairly common; but we find it surprising that only 20% say they use crowd-testing to test real-world scenarios. We are not aware of any large IT company delivering such a service, which is complex to manage due to French social regulation. However, it is an approach that some smaller entrepreneurial operations provide on an as-a-Service basis.

Catching up in QA and testing developments

Because French organizations are so keen to make up for lost time, we see distinct differences from the rest of the world in testing within agile and DevOps environments – 29% for both, against 25% and 27% for agile and DevOps, respectively, elsewhere. In fact, testing in waterfall is higher too, so it's true



to say that the French are spending more time than others in general on their testing.

We have already noted that the French have more in-house test environments than most other countries, but that doesn't mean they always find it straightforward. Test environments and data are an issue. The French rely on production capacity for test data management (TDM) and also on custom development for the production of new data. Very few companies are using off-the-shelf software to generate their test data. It's a further sign of relative market immaturity.

We can also see issues with the inability to apply test automation at appropriate levels. France is a full eight percentage points ahead of the rest of the world in this respect. Levels of automation are low right now, and the country has a relative lack of expertise in knowing what to automate, and which tools to use. Low levels of automation also explain why the reported difficulty with reusing and repeating tests is so low.

Elsewhere in the survey, we see the effect of agile and DevOps developments on the skills gap. Like many businesses in many other countries, French organizations look for multi-talented people who can develop, build, test, and implement, and who also have business knowledge and data science skills.

Similarly, two-thirds of French respondents (66%) say they lack skilled and experienced test automation resources, as well as the right automation tools (also 66%). French companies tend to have fewer such tools, which slows them down. All of this explains why they are achieving fewer benefits from test automation than their peers elsewhere.

Skills in artificial intelligence (AI) and in test automation are further cases in point. The number of AI projects and machine

learning (ML) projects under way in France is significantly lower than average, but the mean percentage investment in this area is high: an average of 30% of total IT budget is allocated to French AI projects, compared to just 21% on average elsewhere in the world. France is investing hard to catch up – and much of this investment is in people and skills. More than half of French respondents (51%) say they have their own AI people or their own IT division, compared to a total of 43% for the rest of the world.

Looking ahead

Finally, a quick look at budgets corroborates the French picture we have been exploring in this article. In the last three years, 78% of the country's businesses increased their proportional spend on QA and testing, against 87% in the rest of the world – but look ahead to the next three years, and it's a different story. French organizations estimate they will be spending an average of 29% of their total IT budget on all testing, versus an average of 27% in other countries.

As competition increases in France, companies will accelerate the pace at which they move to new, faster, and more powerful approaches to testing. It will be better for them – and it will mean they can deliver higher levels of quality to their customers, too.

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