

WORLD QUALITY REPORT

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Southern Europe

Jose Luis Anton

Vice President, QA & Testing & Security
Sogeti, Spain

Marco Bonanni

Managing Consultant,
Cappgemini, Italy

Carlos Vidinha

Principal, Testing Practice,
Cappgemini, Portugal



IMPORTANT TRENDS

- The share of QA and Testing in the overall IT budget stands at an average of 28% in Southern Europe, a full three percentage points below the worldwide average.
- When asked to indicate the importance of different aspects of their IT strategy, Southern European respondents gave the highest weighting to security.
- Agile adoption rates in the region are on par or slightly higher than the worldwide averages.

The QA and Testing function in Southern Europe stands on the threshold of massive change. The three countries that make up this market, namely Italy, Portugal and Spain, have traditionally been seen as medium to small IT markets. In addition, the average software development lifecycle processes here have often been marked by a certain lack of maturity. Today however, trends such as digitalization and the enormous interest in agile and DevOps are set to completely change this. IT as a whole is expected to move towards more agile practices and the QA and Testing function is set to follow.

Currently, the share of QA and Testing in the overall IT budget stands at an average of 28%, a full three percentage points below the worldwide average. The root cause for this is that until a few years ago, testing as a function was embedded within development teams in most organizations. Even today, apart from exceptions, such as some of the multinationals or the web-based business ecosystem, most companies are still getting QA and Testing work done on an ad-hoc or time and materials basis. As a result, they often lack well-defined processes or procedures for this.

That said, things are changing rapidly. Digitalization and mobile device management have made agility, security and faster

time-to-market paramount for businesses. This in turn, has led to massive interest in agile and DevOps. A number of transformational projects are being undertaken and, as such, the share of QA and Testing in the overall IT budget is expected to rise in the future. Southern European IT leaders interviewed for the World Quality Report 2016 survey indicated that they expected QA and Testing to rise to 39% of the overall IT budgets over the next three years.

The interest in agile and DevOps is in fact the biggest trend in the Southern European region. One reason for this is the emerging perception of IT as both supporting the business and being the business itself. This is driving interest in the adoption of agile, which is seen as a much better framework for aligning IT with business interests than the traditional waterfall method. Another reason is the general climate of economic downturn and the budgetary constraints being faced by companies. Due to this, organizations are focusing more on smaller initiatives and iterative approaches rather than on big, multi-year projects. This too, fits in perfectly with the agile and DevOps frameworks.

For most organizations, this interest is still at an early, exploratory stage. However, as pointed out earlier, a few organizations in the Financial Services sector, as well as some of the multi-national



and web-based companies, are already following such practices in a fairly structured manner. Our survey respondents indicated that agile adoption rates are on a par with or slightly higher than the worldwide averages. The Scaled Agile Framework (SAFE) is especially popular, with an average 27% of all projects reported to be using it, as opposed to 24% worldwide. 63% of our respondents also reported using DevOps for more than half of their projects. Anecdotal evidence, however, suggests that the percentage of organizations which have properly implemented DevOps might be lower than this.

One challenge in the adoption of agile and DevOps, as well as with the general movement towards QA and Testing maturity, is the lack of skilled manpower. This is particularly so for non-functional testing and skills related to test environments and virtualization. In part, the current interest in cloud solutions and virtual machines can also be seen as an effort to use technology to address this challenge.

Another challenge driving change in the QA and Testing function in Southern Europe is the need for IT security. When asked to indicate the importance of different aspects of their IT strategy, Southern European respondents gave the highest weighting to security. According to our survey, 58% of respondents from Southern Europe indicated that they paid special attention to security requirements and risks when testing cloud-based and/or third-party SAAS providers. The corresponding worldwide average stood at just 53%. Similarly, when testing mobile applications, security was the area on which our Southern European respondents focused the most, with 51% focusing on security as opposed to 46% worldwide. This is clearly a major

area of concern and is driven not only by the proliferation of mobile channels and applications, but also by the stringent data security regulations in place in Europe.

The interest around agile and DevOps is also driving the trend towards test automation. However, test automation practices in Southern European countries still have a long way to go. One of the challenges facing them is the lack of proper test environments and test data. Southern European respondents also pointed to the need to maintain multiple versions of test environments as a particular challenge when it came to provisioning of test environments.

When it comes to the Testing Center of Excellence (TCOE) model the Southern European market returned some mixed trends. Depending on the sector and country, different companies are moving towards either hybrid TCOEs or centralized agile TCOEs. For instance, Financial Services and Telecoms companies in Spain are clearly moving towards the hybrid TCOE model, whereas web-based companies are showing a movement towards centralization. On the other hand, in Italy, Financial Services and Telecoms companies are moving towards setting up centralized TCOEs and combining this with a general in-sourcing approach.

To sum up, QA and Testing in Southern Europe is poised at an interesting stage. While it is clearly behind the curve when it comes to the adoption of some of the cutting-edge QA and Testing practices, there are a number of factors driving it towards the next stage in its evolution. In the coming years, we can expect these factors to revamp QA and Testing in Southern Europe into a more competent, sophisticated function.



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If you desire more information about testing tools, please contact

Toby Marsden, EMEA ALM Business Leader
toby.marsden@hpe.com

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