# WORLD QUALITY REPORT

## 2017-18 | NINTH EDITION

# Southern Europe

**Jose Luis Anton**
Vice President, Digital Assurance & Testing,
Sogeti Spain

**Carlos Vidinha**
Principal, Testing Practice, Capgemini,
Portugal

**Marco Bonanni**
Managing Consultant,
Capgemini Italy

## IMPORTANT TRENDS

- When asked about the objectives of their IT strategy, respondents gave the highest weighting to business outcomes such as 'enhance customer experience', 'enhance security', 'increased output (implement more requirements from business)' and 'faster time-to-market'.

- 63% respondents from Spain, 57% from Portugal and 48% from Italy cited challenges in complying with data security and data privacy regulations in the management of their test data.

- Scrum is the most widely adopted agile methodology, followed by the Scaled Agile Framework (SAFE) and the Dynamic Systems Development Method (DSDM).

In last year's report, we saw that the traditional IT markets of Spain, Italy and Portugal were poised on the threshold of a massive change. This year, we see the impact of these changes on QA and Testing practices across the region. There are signs of a growing alignment between IT and business, with objectives such as enhancing customer experience and improving time-to-market assuming primary importance. There is also an increasing adoption of trends such as agile, DevOps and automation. In addition, the industry is also struggling with challenges around security, data privacy, test strategy and a shortage of adequately skilled resources.

At a macro level, there is a shift in the perception of IT, from being seen as merely a support function, to something that is crucial for the growth of an organization. This can be seen from the expectations being put on IT departments. According to our survey, when asked about the objectives of their IT strategy, respondents across Southern Europe gave the highest weighting to business outcomes such as 'enhance customer experience', 'enhance security', 'increased output (implement more requirements from business)' and 'faster time-to-market'. Similarly, when asked about the objectives of their QA and Testing activities, respondents gave the highest weighting to 'ensure end-user satisfaction' and 'increase the quality of software or product'.

This stress on business outcomes is leading to an overhaul of the IT function as a whole. The rapid adoption of frameworks such as agile and DevOps by organizations across Southern Europe is driving this change. Scrum as a practice is the most widely adopted, followed by methodologies such as the Scaled Agile Framework (SAFE) and the Dynamic Systems Development Method (DSDM). However, there are signs that many Southern European organizations are lacking in maturity in terms of their IT practices and face significant challenges in realizing the full benefits of these frameworks. For instance, when asked about the challenges in applying testing to an agile environment, Italian respondents gave the highest weighting to 'inability to apply test automation at appropriate levels' and 'difficulties created by the need for early involvement of testing team in inception phase or sprint planning', Spanish respondents mentioned challenges such as 'difficulties in re-using and repeating tests across sprints/iterations' and 'lack of professional test expertise in agile teams' while Portuguese respondents highlighted points such as 'lack of appropriate test environment and data' and 'lack of a good testing approach that fits with the agile development method'. In addition, anecdotal evidence also suggests challenges related to tools and test environments.

All of these challenges stem from a lack of maturity as organizations are still figuring out how to adapt to agile. Similar challenges can also be seen with the adoption of DevOps. According to our survey, Italy and Portugal lag behind the worldwide averages when it comes to the adoption of DevOps while Spain is slightly ahead. This could be due to a well-established internet economy and a thriving eco-system of internet startups and e-commerce companies in Spain.

Frameworks such as agile and DevOps are also changing the ways in which testing activities are organized in the region. There is a movement towards hybrid Testing Centers of Excellence (TCOEs) and the rise of agile TCOEs. In Italy and Portugal, testing activities are being split among a number of smaller teams. The driving force behind this is the need to optimize time-to-market. Of course, significant challenges exist in making such a model work. According to our survey, when asked about the challenges in setting up an agile TCOE, respondents in Italy and Spain gave the highest weighting to 'emergence of new testing tools which need development skill sets' and 'traditional test design models that are unsuitable for agile delivery models' while Portuguese respondents pointed to the 'necessity to co-locate teams, denying the cost savings of globally distributed delivery models' and 'testing teams not being as agile as development teams'.
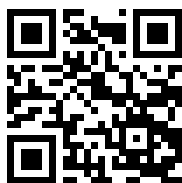
In the last one year, there has also been a huge rise in the interest around automation. This trend is the strongest in Italy, where there is a lot of talk around topics such as continuous deployment, continuous integration, test automation as well as real-time automation. According to our survey, both Italy and Portugal, are ahead of the worldwide averages when it comes to different types of automation, while Spain lags behind. Part of the reason for this could be early experiences of Spanish organizations with automation which backfired due to a lack of planning, skills and maturity. According to respondents, 'not having the right testing process/method', 'difficulties in integrating various automation tools together' and 'current automation solutions not supporting mobile testing' were three of the more common challenges to achieving higher levels of automation in the region.

Another major trend is a growing concern around security. This is being driven by trends such as digitalization, cloud and Internet of Things (IoT) and has been brought into further focus by the General Data Protection Regulation (GDPR) which will come into force in May next year. Data privacy and test environment management in particular have become high-priority topics due to GDPR. For instance, when asked about their challenges in managing test data, as many as 63% respondents from Spain and 57% from Portugal as opposed to 48% from Italy and 50% respondents worldwide cited challenges in complying with data security and data privacy regulations. Similarly, when asked about the areas on which they focused their testing of mobile applications, 57% respondents in Portugal and 52% in Spain as opposed to 40% in Italy and a worldwide average of 43% chose security.

Apart from security, some of the other challenges common to the region include a lack of skilled and experienced QA and Testing professionals who can handle the requirements posed by some of the new developments such as automation testing, omni-channel testing and agile and DevOps frameworks. There are also challenges around testing of IOT products, which are likely to rise in importance over the next couple of years.

All in all, QA and Testing in Southern Europe is going through a period of massive change being driven by trends such as agile, DevOps, automation, security, data privacy and digitalization. As organizations adapt to these new developments, they will likely unlock the full benefits promised by these trends over the next couple of years.

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## Contact Micro Focus

If you desire more information about testing tools, please contact

**Toby Marsden,** EMEA ALM Business Leader
toby.marsden@microfocus.com, +44 7867 526374