

WORLD QUALITY REPORT

2017-18 NINTH EDITION



Nordic Region

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IMPORTANT TRENDS

- After a period of experimentation, many Nordic organizations are recalibrating their approach and re-configuring their organizations and strategies to better fit the requirements of agile and DevOps.
- At 34.13%, Norway's average allocation of its IT budget to QA & Testing is second-highest among all the countries surveyed.
- Almost a 100% of projects in Sweden, Denmark and Finland use one or the other DevOps principle.

The Nordic countries i.e., Sweden, Norway, Denmark and Finland were amongst the first to take to trends such as agile, DevOps, digitalization and automation. Organizations across the region enthusiastically adopted these technologies and frameworks, changed their workflow, their strategies and their organizational structures and also launched a number of new initiatives. Today, after this period of giddy experimentation, comes a phase of consolidation. Companies are now recalibrating their approach and re-configuring their organizations and strategies to better fit the requirements of agile and DevOps. One consequence of this process has been the steep rise in demand for qualified QA & Testing professionals who can meet the requirements of these new technology trends. In addition, new technologies such as predictive analytics and cognitive intelligence are also generating a lot of interest.

While the above are a few of the key trends of 2017, the Nordic market is also marked by many other features which make it interesting. One of the first things that stand out when looking at QA and Testing in the region is the high proportion of the IT budget dedicated to it. For instance, at 34.13%, Norway's average allocation to QA and Testing is second-highest among all the countries surveyed and this percentage is expected to go up to as much as 40.33% in three years time. This higher percentage is indicative of the region's technological lead and the investments made in QA and Testing.

The other big feature of the Nordic market is its adoption of agile and DevOps. While the region trails the worldwide averages in terms of the percentage of projects in agile, we also see a high level of maturity with agile. Having been amongst the early adopters of agile, many organizations today are trying to take their learnings and apply them enterprise wide. This explains the immense popularity of the Scaled Agile Framework (SAFE) in this part of the world with an average 7% of all projects in Finland employing this framework as opposed to an average of 5% worldwide. This trend is only expected to grow stronger in the coming years.

As mentioned earlier, QA and Testing practices are generally going through a process of consolidation. Many organizations which found it hard to work with distributed agile teams are now centralizing some of the testing support functions. This increased maturity and experience with regards to agile, is also reflected in the shortage of skills in the Nordic market. Organizations seek test developers, programmers with testing experience and testers skilled in test data management, automation and service virtualization. In short, there is an increased demand for T-shaped testers, or testers with a variety of skills and expertise.

Similar trends are seen when it comes to DevOps. The Nordic region, with the exception of Norway clearly leads the rest of the world in the adoption of DevOps. According to our survey, almost all projects in Sweden, Denmark, and Finland use one or the other

DevOps principle. The corresponding worldwide average is only 88%. Breaking down large efforts into smaller batches of work, continuous monitoring with the help of predictive analysis and the use of virtualized and cloud-based test environments are some of the most commonly used DevOps practices. As with agile, DevOps requires a greater involvement from QA and Testing, not just during the development process but throughout the entire process of bringing a product to market. Such requirements add to the demand for qualified QA and Testing professionals, a demand that is proving increasingly difficult to meet.

A similar shortage of skills is also seen in the field of testing automation, another topic that is generating a lot of interest across the region. While the overall level of test automation in the region is similar to the worldwide averages, there are important individual variations between the different countries. In general, Denmark and Finland seem to have automated testing for a higher percentage of their projects than the worldwide average, while Sweden and Norway seem to be lagging in this aspect. When asked about the challenges in achieving a higher level of test automation, respondents across the region cited 'challenges with test data and environment availability', 'inappropriate automation process' and 'lack of support for mobile testing' as the main factors. Currently, there is immense interest around the areas of cognitive or predictive analytics as well as robotics automation and they are expected to become increasingly popular in the years to come.

Another big trend in the Nordics region is related to security testing. When asked about the objectives of their IT strategy, respondents in Denmark picked 'enhanced security' as their most important objective, while respondents in Sweden and Norway rated it as their second most important objective. Additionally, as

many as 60% respondents in Denmark and 57% in Norway cited 'complying with data security and data privacy regulations' as a major challenge in managing test data. This concern with security is in part, a result of the General Data Protection Regulation (GDPR), which has fairly stringent requirements with regard to the management and storage of test data and is scheduled to come into force by mid-2018.

The Nordic region is also marked by a high degree of adoption of cloud, with Norway, Denmark and Finland reporting a higher percentage of cloud-based applications when compared to the world wide average. Norway and Denmark also reported a higher usage of cloud-based test environments with mostly performance and security testing being done in the cloud. Another noticeable trend is the move towards decentralization of certain testing activities. Thus, after a wave of centralized Testing Centers of Excellence (TCOE), a number of organizations across the region have recently been moving towards hybrid TCOEs i.e., centralizing certain activities and decentralizing others.

In summary, the Nordic region presents the picture of an early adopter which after a period of experimentation, is going through a phase of refining and fine-tuning its strategies and approaches. At the same time, the region's appetite for trying out new technological approaches continues unabated, as displayed by the interest in machine learning, cognitive intelligence and predictive analytics. These trends, together with the increased adoption of cloud and automation, and the importance given to security, help round out the QA and Testing story for the Nordic region.



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