# WORLD QUALITY REPORT

# BENELUX

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## Top Trends

- In 2014, the share of QA and Testing budget dedicated to maintenance work has reduced from 51% in 2013 to 45%, freeing up funds to focus on new initiatives.

- Despite the heightened focus on application quality, the proportion of QA and Testing in the overall IT budget has not grown, reflecting the growing trend toward integrating deployment and development organizations (DevOps) and higher levels of efficiency in the QA and Testing function.

- Organizations are moving away from exclusively using internal resources and are looking for partners who can help set up the framework for effective testing processes within the context of agile delivery environments involving ongoing interaction with business owners and end-users.

This year's research shows that most (62%) IT executives interviewed in the Benelux region (Belgium, the Netherlands and Luxembourg) continue to view cost optimization as their company's top IT priorities. However, this doesn't mean that companies aren't investing in innovation. One of the key IT trends in the region is the drive to free up resources dedicated to legacy application maintenance projects and divert them to new initiatives that focus on digital transformation and customer experience.

In order to increase the efficiency of maintenance projects and update existing systems to support new technologies, organizations are investing in application integration. Some 62% of research respondents cite the integration of IT systems as their top investment area, with 47% of respondents citing building and enhancing applications developed in-house as being a major priority for IT investment.

The shift toward new initiatives is evident in the proportion of Quality Assurance and Testing budget allocated to new developments versus maintenance initiatives. Last year, research participants reported that half of the budget (51%) was being spent on maintenance, while in the 2014 research, the share for maintenance work has reduced to 45% (better than the global average, reported at 48%), freeing up funds to focus on new initiatives.

Despite the heightened focus on application quality, the proportion of QA and Testing in the overall IT budget has not grown this year (26% in 2013 down to 24% in 2014). Among the most significant factors affecting the proportion of IT budgets spent on QA and

Testing is likely to be the shift in application delivery methods toward agile and continuous integration, and the growing trend toward integrating deployment and development organizations (DevOps). These new structures make it more difficult to break out the exact amounts being spent on application quality. Another element that helps explain the lack of budget growth (in proportion to the overall IT spend) is increased efficiency of the testing function: rising levels of test automation and more effective testing processes, whereby companies are able to achieve the same results with lower levels of investment.

Nearly all of the IT executives interviewed from the Benelux countries (97%) state that their organizations are now using agile delivery methods – a trend that impacts the way that testing organizations are structured. In previous years, many companies were striving to centralize their QA and Testing function, setting up a service to support multiple business units with standard sets of deliverables and measurement practices. This practice proved effective in the waterfall-type delivery environment. However, the increased adoption of agile and DevOps environments requires organizations to adapt their approach to test factories. New delivery methods need more flexibility and closer alignment between QA and Testing and the business, and the research findings reflect this change. According to senior IT executives interviewed in the Benelux region, the most prominent organizational structure today is a combination of centralized and decentralized teams (reported by 45% of participants, a sharp increase from 17% in 2013), while the number of organizations not having a separate testing team has decreased from 21% in 2013 to 9% in 2014.

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The number of organizations reporting they have a fully functional Testing Center of Excellence (TCOE) has remained at 32% despite the rise of hybrid approaches. But more organizations have plans to industrialize their testing function or have already begun setting up a TCOE – 50% in 2014, up from 38% in 2013.

The changing approach to the structure of testing functions is also reflected in the ways that companies engage with third-party service providers. Organizations are moving away from using only internal resources and are looking for partners who can help set up a framework for effective testing processes within the context of agile delivery and ongoing interaction with the business and customer. In 2013, the research showed that 39% of testing was carried out using exclusively internal resources, while in 2014, the share of projects that are not outsourced has fallen to 30%. This year, respondents state that 37% of their testing activities are managed entirely by a service provider or conducted in partnership with a specialized testing service provider, with the aim of not only delivering high application quality but also improving their testing practice.

According to the 2014 research, the number of applications being hosted in the Cloud has risen from 20% in 2013 to 24% in 2014. This can most likely be attributed to more applications being hosted using a private cloud infrastructure. However, in recent years organizations in the region have shown a growing level of acceptance of the Software as a Service model. The cost-of-ownership advantages of cloud-based applications are likely to break down barriers, leading more companies to take advantage of cloud-based platforms. The research participants predict that by 2017, a third of their applications (33%) will be migrated to the Cloud. Similar trends are seen in cloud-based testing. The culture of continuous integration and fast-paced application delivery schedules require test environments and infrastructure to be available without delay. The ability to deliver a test environment on demand is driving a growing number of companies to invest in cloud-based testing. This year's IT executives interviewed state that 29% of their applications are being tested in the Cloud, and predict that this number will grow to 43% by 2017.

Mobility remains a strategic area for the companies in the Benelux region. The number of respondents who state that they are currently testing mobile applications has risen from 56% in 2013 to 86% in 2014, suggesting the growing importance of mobile applications for businesses, and the ongoing need for validating the accuracy, performance, functionality and security of mobile applications and devices. Similar to last year, organizations in the region report concerns about tight timelines for testing (55%), having the right tools (47%), and a lack of mobile testing experts (46%). Partnering with specialized service providers with access to a wide range of devices, experts and methods continues to be the preferred way to address the challenge of validating mobile application quality.