

WORLD QUALITY REPORT

2016-17

EIGHTH EDITION

Middle East

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IMPORTANT TRENDS

- 32% of the IT spend is on QA and Testing, marginally higher than the global average of 31%.
- Despite the importance given to time-to-market, the Middle East has one of the lowest adoption rates for agile and DevOps among all regions surveyed for the World Quality Report 2016.
- The decentralized agile TCOE is the most popular model in the Middle East, followed by the hybrid TCOE model

The Middle East is marked by short turnaround times for IT projects and a high degree of cost consciousness. When compared to the rest of the world, QA and Testing processes here are still somewhat immature. There have been a few early signs that this is changing, with a number of recent investments made in digitalization, automation and agile. However, with the current economic troubles brought about by the drop in oil prices, many of these IT projects are now on hold. This is likely to further slow down the region's movement towards greater process maturity.

According to the World Quality Report 2016 survey findings, 35% of IT leaders from the Middle East have seen an increase in the proportion of the IT budget spent on QA and Testing over the last three years. Overall, 32% of the IT spend is on QA and Testing, marginally higher than the global average of 31%. In this region, the largest proportion of this budget is spent on hardware and infrastructure, followed closely by tools and software licenses.

There has been a steady increase in mobile and multi-channel testing. This trend is gaining ground as the move towards digitalization is promoted by several governments across the region. A typical example from the region would be a recently launched government mobile app that integrates services like the water bill, electricity bill, car parking and toll top-up in a single account. Certain other sectors, such as Financial Services, as

well as Consumer Products, Retail & Distribution, have also begun to transform with digital. Most of these initiatives are being driven by third-party service providers with a lot of the QA and Testing being offshored.

Our survey findings reveal that significant challenges exist in terms of the existing infrastructure and skill sets. When asked about the greatest challenge in testing mobile and multi-channel applications, respondents give the highest weighting to 'a lack of the right testing process/method' and 'no in-house testing environment.' Similarly, when asked about customer experience testing for multi-channel applications, the same respondents indicate challenges with 'designing the test cases', 'establishing the test data for customer experience testing' and 'implementation/usage of test tools for customer experience testing'.

Over the last few years, the Middle East has seen a growing alignment between IT and business. According to this year's survey, 'increasing the quality of the product' and 'ensuring end-user satisfaction' are two of the biggest objectives for QA and Testing activities in the region. Middle Eastern respondents also give the highest weighting to 'enhancing security' and 'implementing DevOps' when asked about the objectives of their IT policy. It is this increasing alignment between IT and business that has driven the wave of transformational projects launched



across the region in the recent past. However, while it is clear that a number of efforts are being made to move the QA and Testing function towards modernization, these efforts are often held back by legacy infrastructure, tools and processes.

This comes through clearly when we look at the adoption of agile and DevOps. Despite the importance given to time-to-market, the Middle East has one of the lowest adoption rates for agile and DevOps among all regions surveyed for the World Quality Report 2016. For instance, the Scaled Agile Framework (SAFE) is used for an average 17% of all projects in the Middle East, as opposed to 24% globally, Scrum for 16% of all projects (24% globally), Extreme Programming (XP) for 10% of all projects (17% globally) and Dynamic Systems Development Method (DSDM) for 12% of all projects (22% globally). Quality professionals from the Middle East cite the 'lack of appropriate test environments and data' as well as the 'difficulties in re-using and repeating tests across sprints/iterations' as two of the biggest challenges holding back the adoption of agile in the region.

Similarly, the adoption of DevOps is the lowest among all the regions surveyed. A mere 9% of Middle Eastern quality professionals, as opposed to 39% globally, say that they are using DevOps for more than half of all their projects. This low rate of adoption of both agile and DevOps is despite the emphasis placed on time-to-market in the region and is a reflection of the limitations imposed by legacy processes and a lack of qualified staff. It is clear that for any meaningful progress to take place, a lot of retraining has to take place and the senior management has to be actively involved in championing new processes.

The region also shows mixed trends when it comes to Testing Centers of Excellence (TCOEs). When asked about the organization of their testing activities, 53% (out of 335%) of IT leaders from the Middle East say they outsource their testing activities to independent QA partners. This is the highest among all the regions surveyed. Additionally, the decentralized agile TCOE is the most popular model in the Middle East, followed by the hybrid TCOE model.

Another trend that has been taking off recently is testing automation. According to this year's survey findings, 29% of all test cases are automated in the Middle East. When asked about the challenges in achieving their desired levels of test automation, the region's quality professionals also say they face challenges with integrating different automation tools and in automating for multiple development cycles.

Summing up, we see that in terms of process maturity the Middle East still has to do some catching up with the rest of the world. While the adoption of agile and DevOps is behind the global average, trends like digitalization and automation of testing activities are slowly gaining ground in the region. While the current economic challenges have led to a number of transformational and business-oriented projects being put on hold, it is expected that they will be re-started as the economy recovers, further driving the evolution in QA and Testing practices in the region.



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If you desire more information about testing tools, please contact

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