

# Middle East

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## Important trends

- The winning combination of local experience with global expertise is helping to embed global best practices in Middle East operations.
- A significant 40% of the QA and Testing budget is allocated to testing hardware and infrastructure, 3% more than the global average.
- With mobile solutions consuming 21% of the QA and Testing budget allocated to new development, the Middle East is the highest spender in this domain.

Higher quality of software solutions, security and IT cost optimization are the top three IT priorities of Middle Eastern executives interviewed for the World Quality Report 2015. Likewise, increasing quality awareness across all disciplines is a top priority in the region's QA and Testing programs. The priorities reflect willingness to question business-as-usual and invest in tools and expertise that transform IT into a strategic business partner. This is driven by two developments in the region:

- Organizations are assigning leadership roles, such as Chief Information Officer (CIO) and Head of Innovation, to govern strategic Digital Transformation and multi-channel projects. Up to 69% of the respondents interviewed also say they either already have a dedicated Chief Digital Officer, or plan to recruit one before the end of 2016, on a par with responses from Western Europe (70%). The winning combination of local experience with global expertise is helping to embed global best practices in Middle East operations;
- Eager adoption of smart personal technology, including mobile devices and productivity applications, in a market driven by high discretionary spend across consumer segments and a thriving entrepreneurial spirit.

Driven by the strong competition to acquire and retain customers, Retail and Financial Services are aggressively expanding capabilities in the digital arena. With Digital Transformation gaining momentum, software quality is more closely related to business outcomes, impacting sales, customer satisfaction and corporate reputations. Multi-channel applications, for example, enable customers to directly interact with business, while also changing the way in which employees collaborate with partners in the extended enterprise. Balancing these risks and opportunities calls for a greater commitment to Quality Assurance and Testing, having an impact on budgets, according to the research data. On a par with the global average (35%), QA and Testing

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gets 34% of total IT budgets in the Middle East, with nearly a third already allocating above 40%. Additionally, 45% see QA and Testing budgets increasing beyond 40% of IT budgets by 2018.

A significant 40% of the QA and Testing budget is allocated to testing hardware and infrastructure, 3% more than the global average. Tools and licenses receive 25% of the investment, which is 5% lower than the global average. However, in some sectors in the Middle East, investment in tools and licenses is seen as an indicator of improving efficiency or best practice adoption. Consequently, 27% of the IT executives in the Middle East say their organizations invest more than 30% of the QA and Testing budgets in tools and licenses. In many ways, the budget breakdown reflects the early stages of maturity in the region's QA and Testing organizations.

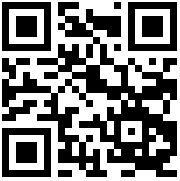
Although budgets in the Middle East are evenly divided between new development and traditional maintenance work, the overall level of pure transformational initiatives is still fairly low. Nearly three quarters (73%) of the QA and Testing budget allocated to new development is dedicated to mobile, Cloud, analytics and front office (customer-channel) application testing projects, on a par with what North America spends in these areas.

There is a growing recognition of the business benefits offered by cloud-based applications and testing. A total 42% of the cases in the Middle East are tested in a cloud-based environment. Up to 54% say they test customer facing applications such as portals and mobile solutions in the Cloud, and 56% say they pay special attention to data security requirements while testing Software-as-a-Service applications in a cloud-based environment. Cloud brings a pay-per-use model to the cost matrix, allowing organizations to accurately tie testing spends to business dynamics. However, public cloud adoption in the Middle East is limited to 25% of the cloud-based applications, reflecting the regulatory environment and risks to customer data.



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With mobile solutions consuming 21% of the QA and Testing budget allocated to new development, the Middle East is the highest spender in this domain. Only one in ten Middle East respondents say they aren't testing mobile. Dubai, a global center for trade and commerce, spends as much as 34% of its QA and Testing budget allocated to new development on mobile solutions. Across the region, up to 65% say they focus mobile testing efforts on security testing for the protection of data. Similarly, 65% also focus on efficiency or performance, including network-related issues.

For a region that gives a high priority to security, 18% of the respondents say they aren't testing applications for security assurance, and only 32% participate in application security assurance activities in the requirements definition phase of application lifecycles. However, 24% also add that they use the services of an external security team on a project basis, and 32% resort to staff augmentation. These are all early signs of an acceptance that certain security assurance activities are better left to experts — always a finite resource in fast-growing markets. Additionally, 62% say an internal team with owned tools performs security testing activities in their organizations.

Up to 45% of all test cases in the Middle East are automated, and nearly 73% attribute

better reuse of test cases and control and transparency of test activities to automation. However, 32% cite incompatibility with delivery methodology as a barrier to increasing the level of automation. Industrialization via a Testing Center of Excellence (TCOE) is also slowly gaining traction — up to 25% of the IT executives say they benefit from a fully operational TCOE with in-house capabilities. However, an equal number don't have any TCOE plans in place. Up to 8% say they plan to start an agile TCOE and 39% add that decentralization for improved agility and efficiency is an important element of their TCOE set up. Challenges in setting up an agile TCOE include the unsuitability of traditional test design methods for agile delivery models, as quoted by 73% of the participants.

Agile testing methods are adopted by 45% of Middle East organizations taking part in the survey. At 40% usage, the Scaled Agile framework methodology (SAFe) and agile TMap principles, are the most used guidelines and frameworks for testing. DevOps principles on the other hand are adopted by just over three quarters of the Middle Eastern World Quality Report 2015 participants.



## Contact HP

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