

# **Software Quality Assurance Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented, By Solution (Supplier Quality Management, Corrective & Preventative, Change Management, Document Control, Audit Management, Complaint Handling, Calibration Management, Employee Training, Others), By Deployment (Cloud, On-premises), By Organization Size (Large Enterprise, Small & Medium-Sized Enterprise), By Region, By Competition, 2019-2029F**

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## **Abstracts**

Global Software Quality Assurance Market was valued at USD 13.49 billion in 2023 and is expected to reach USD 22.40 billion by 2029 with a CAGR of 8.66% during the forecast period. The Software Quality Assurance (SQA) market encompasses a wide range of processes, practices, and tools designed to ensure that software applications meet required standards and perform as expected. SQA is a critical component of the software development lifecycle, aimed at identifying and addressing defects, improving software quality, and ensuring that products are free from errors or vulnerabilities before release. The market includes a variety of quality assurance methodologies such as manual testing, automated testing, continuous integration testing, and performance testing, which can be applied across different stages of software development. This market is driven by the growing complexity of software applications and the increasing need for businesses to deliver high-quality, secure, and reliable software products to remain competitive. In addition to traditional testing techniques, the rise of agile development, DevOps practices, and the use of artificial intelligence and machine

Learning for smarter testing are shaping the future of the SQA market. With industries such as healthcare, finance, retail, and manufacturing relying heavily on software-driven systems, the need for comprehensive quality assurance solutions to ensure regulatory compliance, user satisfaction, and operational efficiency is becoming more pronounced. Moreover, as organizations shift towards cloud-based and mobile applications, the demand for specialized testing services and tools that address the unique challenges of these environments is expanding.

## Key Market Drivers

### Growing Demand for Software Reliability and Performance

The increasing reliance on software applications across various sectors is driving the demand for Software Quality Assurance market. As businesses adopt digital transformation initiatives, the need for high-performing, reliable software systems becomes paramount. Software failures, whether due to bugs, security vulnerabilities, or performance issues, can result in significant financial losses, reputation damage, and legal consequences. As a result, companies are placing greater emphasis on quality assurance processes to ensure their software meets stringent quality standards. This trend is particularly evident in industries such as finance, healthcare, and e-commerce, where software performance and reliability are critical to business success. As organizations continue to expand their digital presence, the demand for advanced testing techniques, automation, and continuous integration in software development is rising. In addition, the rapid growth of cloud computing and the increasing use of mobile applications create further complexities in software systems, heightening the importance of ensuring their stability, scalability, and security. To meet these demands, businesses are investing in robust SQA processes to identify and resolve software issues early in the development lifecycle, ensuring that applications are free from defects, optimized for performance, and capable of supporting growing user bases and workloads. This need for software reliability and performance is a primary driver of growth in the Software Quality Assurance market.

### Adoption of Agile and DevOps Methodologies

The widespread adoption of Agile and DevOps methodologies has significantly influenced the Software Quality Assurance market. These methodologies prioritize continuous development, integration, and delivery, which increases the frequency and speed at which software is released. As Agile and DevOps require rapid iteration and deployment of software, maintaining consistent software quality becomes more

challenging, driving the demand for sophisticated SQA tools and practices. Agile development emphasizes close collaboration between developers, quality assurance teams, and stakeholders, with a focus on frequent releases and feedback loops. This collaborative approach enhances the need for automated testing, real-time monitoring, and continuous integration to ensure that each software release meets quality standards and functions seamlessly. DevOps, on the other hand, combines development and operations teams to streamline the software lifecycle, with a focus on automating and improving the software delivery pipeline. To align with these methodologies, SQA practices must evolve to incorporate continuous testing, automated regression testing, and performance monitoring tools that support rapid iterations. Moreover, the shift toward cloud-native applications and microservices architecture further necessitates the integration of continuous testing and quality assurance processes. SQA solutions are evolving to meet these demands, offering capabilities such as automated testing frameworks, real-time defect tracking, and seamless integration with CI/CD pipelines. This evolution aligns with the increasing emphasis on delivering high-quality software quickly and efficiently, making the adoption of Agile and DevOps methodologies a key driver of growth in the Software Quality Assurance market.

### Increasing Security and Compliance Requirements

With the rise of cyber threats and increasingly stringent regulatory requirements, the need for robust software security and compliance testing is becoming a major driver for the Software Quality Assurance market. In industries such as finance, healthcare, and government, software applications must adhere to strict regulatory standards, including data protection laws like GDPR, HIPAA, and PCI-DSS. As organizations face mounting pressure to safeguard sensitive data and ensure privacy, the integration of security testing into the SQA process is critical. Traditional quality assurance practices, which primarily focus on functional testing, are no longer sufficient in today's security-conscious environment. Organizations are now incorporating security testing into every stage of the software development lifecycle to identify vulnerabilities and mitigate risks before deployment. This includes implementing practices such as penetration testing, vulnerability scanning, and threat modeling to ensure that software is resilient to cyberattacks. Additionally, with the increasing use of third-party software and APIs, there is a growing need for comprehensive security testing that extends beyond the core application to assess potential vulnerabilities in external integrations. Compliance testing also plays a pivotal role in meeting industry standards and avoiding costly fines or reputational damage. This growing focus on security and compliance is driving demand for specialized SQA tools that can automate security testing, ensure regulatory

compliance, and provide detailed reporting and documentation. As cybersecurity concerns continue to rise, the integration of security and compliance testing into the software quality assurance process is becoming a fundamental requirement, driving market growth.

## Key Market Challenges

### Evolving Technological Landscape and Increased Complexity

One of the primary challenges in the Software Quality Assurance (SQA) market is the rapid pace of technological advancements, which continually raise the complexity of software systems. As businesses increasingly adopt cutting-edge technologies such as artificial intelligence (AI), machine learning (ML), blockchain, and the Internet of Things (IoT), the demand for comprehensive quality assurance becomes more intricate. Ensuring software quality across diverse platforms, devices, and networks with varied user interactions can be highly challenging. Traditional quality assurance techniques and tools may not be fully equipped to handle the complexities of these emerging technologies, requiring SQA teams to constantly adapt and upgrade their skills and testing methodologies. The integration of AI and ML into software systems, for example, introduces complexities related to data training, model testing, and continuous learning, which cannot always be addressed with conventional QA processes. Furthermore, the growing adoption of DevOps and agile methodologies, while beneficial for speeding up development cycles, introduces challenges in ensuring that quality is maintained without sacrificing speed. Agile practices often prioritize iterative development over extensive testing, and in fast-paced environments, the emphasis on quick delivery sometimes leads to less thorough quality checks. This increase in complexity also amplifies the risk of undetected defects, which can result in significant operational disruptions, security vulnerabilities, or user dissatisfaction if not identified early. Organizations face the challenge of balancing the rapid release cycles of modern software development with the rigorous testing required to ensure reliability, security, and performance. Additionally, there is a growing need to integrate automated testing tools into QA processes, especially for large-scale applications. However, the tools themselves must be adapted to the new technologies being used, often requiring significant investment in research, development, and training. Without the right blend of tools, expertise, and process adjustments, the quality assurance process may struggle to keep pace with the rapid evolution of software technology, which ultimately threatens the market's ability to consistently deliver high-quality software products.

### Resource Constraints and Skill Shortages

Another significant challenge in the Software Quality Assurance market is the shortage of skilled professionals and the increasing pressure on resources. As the demand for high-quality software continues to rise, businesses are finding it difficult to attract and retain experienced SQA professionals who can manage and oversee complex quality assurance processes. The fast-paced nature of software development, combined with the rapid expansion of digital transformation initiatives across industries, has led to a shortage of professionals with the necessary technical expertise in advanced testing methodologies, automation, and tools. Many organizations are now struggling to find skilled QA engineers who can manage testing requirements for modern technologies such as cloud platforms, mobile applications, and integrated IoT systems. Additionally, the increasing adoption of AI and machine learning within software systems requires SQA professionals to have an in-depth understanding of these technologies, making it more difficult to recruit qualified personnel. The lack of skilled professionals often results in organizations needing to train their existing teams, which can lead to delays and increased costs. Furthermore, the high demand for software quality assurance specialists creates a competitive labor market, with businesses often struggling to retain top talent. Companies may have to offer higher salaries or additional benefits to secure qualified personnel, which can be a challenge, especially for small and medium-sized enterprises (SMEs) with limited budgets. Additionally, the rapid adoption of automation in testing processes places further pressure on QA teams to keep up with evolving tools and technologies. While automation can reduce manual testing efforts, it requires specialized skills and knowledge to implement effectively. This reliance on automation tools has led to a situation where there is a shortage of QA professionals who are proficient in the latest automation technologies. The shortage of qualified personnel also leads to overburdened teams, which can result in burnout, reduced efficiency, and higher turnover rates. With fewer skilled professionals available, the risk of overlooking critical software defects increases, potentially leading to significant operational challenges, security breaches, and damage to a company's reputation. In the face of these resource constraints, organizations must invest in ongoing training programs, attract new talent through competitive compensation packages, and explore strategic outsourcing or automation solutions to ensure that quality assurance processes are both effective and sustainable in the long term.

## Key Market Trends

### Shift Towards Continuous Integration and Continuous Delivery (CI/CD)

Another prominent trend in the Software Quality Assurance (SQA) market is the

widespread adoption of Continuous Integration and Continuous Delivery (CI/CD) practices. CI/CD frameworks have revolutionized the way software development and testing are conducted by fostering a culture of automation, collaboration, and rapid iteration. In a traditional development lifecycle, testing often occurs as a separate phase, leading to longer release cycles and potential delays. However, with CI/CD, testing becomes an integral part of the development process, allowing for immediate feedback and quick iterations. The continuous integration aspect ensures that developers frequently commit code to a central repository, where it is automatically built and tested, helping to detect bugs and issues early in the development process. This integration of automated testing into the CI/CD pipeline helps streamline the entire software development lifecycle, ensuring that quality is maintained even as new features and updates are rapidly deployed. Continuous delivery, on the other hand, ensures that software is always in a deployable state, allowing for quick releases to production without compromising on quality. The shift towards CI/CD is being driven by organizations' need for faster software delivery cycles, which is crucial in today's highly competitive and fast-paced digital environment. With CI/CD, software quality assurance is no longer an afterthought but a critical and continuous process embedded within every phase of development. This approach not only enhances software quality by catching issues early but also reduces the cost and time associated with manual testing and traditional quality assurance methods. As organizations strive for greater agility and efficiency, the integration of SQA practices within CI/CD pipelines is expected to continue expanding, leading to more automated, consistent, and faster testing processes.

## Cloud-Based Software Testing Solutions

Cloud-based solutions are another major trend shaping the Software Quality Assurance (SQA) market. As organizations increasingly move their operations to the cloud, the demand for cloud-based testing platforms has surged. Cloud-based testing offers several advantages over traditional on-premises solutions, including scalability, flexibility, and cost-effectiveness. With cloud-based platforms, companies can access an array of testing tools and resources on-demand, without the need for substantial upfront investments in infrastructure or hardware. This makes it easier for businesses to scale their testing operations according to project needs, particularly for large, complex software systems. Additionally, cloud-based software testing platforms support collaborative workflows, enabling geographically dispersed teams to work together seamlessly, share testing environments, and quickly resolve issues. These platforms are particularly beneficial for organizations that adopt agile and DevOps methodologies, where testing needs to be continuous and integrated into the development lifecycle.

Cloud-based testing also enables the use of real devices and environments for mobile application testing, ensuring that software performs well across a variety of devices, operating systems, and browsers. Furthermore, the ability to leverage cloud resources for performance testing allows organizations to simulate large user loads and assess how their software will perform under real-world conditions. Security remains a concern for many businesses adopting cloud-based solutions, but the rapid evolution of security protocols and encryption technologies is addressing these challenges. As cloud technologies continue to mature, their role in the software quality assurance market is expected to grow, providing businesses with powerful, flexible, and cost-efficient solutions for ensuring software quality. Cloud-based testing platforms are also enabling the shift towards more comprehensive test automation, reducing reliance on manual testing while increasing the speed and coverage of testing processes.

## Segmental Insights

### Solution Insights

The Supplier Quality Management segment segment held the largest Market share in 2023. The Software Quality Assurance (SQA) market, specifically within the Supplier Quality Management (SQM) segment, is being driven by the increasing demand for higher-quality software products and the need for seamless integration across global supply chains. As businesses face mounting pressure to deliver high-performance software solutions, the role of SQA in ensuring quality throughout the software development lifecycle is critical. Supplier quality management is a key focus area, as companies seek to minimize risks related to software defects, delays, and cost overruns, which can have far-reaching consequences. With the growing reliance on third-party vendors and software suppliers, organizations are increasingly adopting SQM solutions to ensure that software sourced from external suppliers meets strict quality standards. This shift is motivated by the rising complexity of software ecosystems, where software products must interact flawlessly with other systems and platforms within the supply chain. As digital transformation accelerates, businesses are turning to advanced SQA practices to maintain consistency and prevent quality issues that can compromise the end-user experience. The increasing importance of compliance with industry regulations and standards, such as ISO 9001 and CMMI, also pushes companies to invest in robust SQM systems to ensure that all suppliers meet these stringent criteria. Moreover, the growing trend of agile and DevOps methodologies has intensified the need for continuous testing and monitoring to ensure high-quality software delivery in real-time, further driving demand for SQM solutions.

Another key driver is the shift towards automation in software development and testing. Automated tools are being integrated into the SQM process to improve efficiency, reduce human error, and accelerate time-to-market for software products. This is particularly valuable in managing complex supplier networks where manual processes are insufficient to track and ensure quality across multiple vendors and suppliers. Additionally, as businesses scale their operations globally, the need for effective supplier collaboration and communication grows. Supplier quality management solutions that provide real-time tracking, performance monitoring, and analytics are critical for managing these diverse supplier relationships and ensuring that quality is consistently maintained. The rise of cybersecurity concerns and the need for secure software also plays a pivotal role in driving the SQM market. As organizations prioritize data protection and secure software delivery, SQM solutions are essential for ensuring that software from suppliers meets security standards, mitigating potential vulnerabilities. Lastly, the growing demand for customization and the rise of Software-as-a-Service (SaaS) solutions are adding further complexity to the supplier landscape. Companies are increasingly relying on specialized software suppliers to meet specific business needs, making quality assurance an integral part of the selection and management process. In summary, the Software Quality Assurance market within the Supplier Quality Management segment is being driven by the need for high-quality software, enhanced supplier integration, regulatory compliance, automation, cybersecurity, and the increasing complexity of modern software development processes, all of which highlight the critical role of SQM in ensuring software excellence.

## Regional Insights

North America region held the largest market share in 2023. The Software Quality Assurance (SQA) market in North America is experiencing strong growth driven by several key factors, with the increasing demand for high-quality, reliable software being one of the most significant. As businesses across industries such as finance, healthcare, retail, and technology continue their digital transformation efforts, the need for robust software solutions has become critical. This growing reliance on software in mission-critical applications is pushing organizations to ensure that their systems meet stringent quality standards, fostering a need for comprehensive software testing and quality assurance processes. The increasing complexity of applications, especially with the rise of cloud computing, artificial intelligence (AI), and machine learning (ML), requires sophisticated testing methods to ensure seamless performance, security, and reliability. In addition, the rapid adoption of Agile and DevOps methodologies, which emphasize continuous integration and delivery, has heightened the demand for automated testing tools and real-time feedback mechanisms. These practices allow

businesses to accelerate their development cycles while ensuring that software quality is maintained at every stage of the process. Furthermore, with the growing importance of data privacy and regulatory compliance in North America, especially with regulations like the General Data Protection Regulation (GDPR) and California Consumer Privacy Act (CCPA), organizations are increasingly turning to software quality assurance to ensure compliance with these standards. SQA plays a crucial role in identifying vulnerabilities, mitigating risks, and ensuring that software is secure and compliant with regulatory frameworks.

The need to enhance customer experience through bug-free, high-performing applications also drives the demand for effective quality assurance solutions. With the shift toward mobile and web applications, the need for cross-platform compatibility and performance testing has surged, further expanding the scope for SQA services. Additionally, the rise of outsourcing and the global nature of software development projects are pushing North American companies to adopt standardized testing processes and tools to ensure consistency and quality across distributed teams. The focus on operational efficiency and cost optimization is also contributing to the market's growth. With software defects often leading to substantial financial losses, reputational damage, and customer dissatisfaction, organizations are investing in software quality assurance to prevent such issues. Moreover, the growing need for advanced technologies, such as AI-driven testing tools and automated quality assurance platforms, is fueling innovation and driving market growth. The increasing demand for digital transformation across small and medium-sized enterprises (SMEs) in North America further supports the SQA market, as these businesses seek to adopt best practices in software development and quality management. Overall, the combination of rapid technological advancements, a heightened focus on security and compliance, and the demand for faster, more reliable software is driving the Software Quality Assurance market in North America, positioning it for continued growth and innovation.

### Key Market Players

Honeywell International Inc.

Digital Dream Forge

QA Consultants Inc.

Oracle Corporation

Cognizant Technology Solutions Corporation

Microsoft Corporation

Siemens AG

Parasoft Corporation

### Report Scope:

In this report, the Global Software Quality Assurance Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### Software Quality Assurance Market, By Solution:

Supplier Quality Management

Corrective & Preventative

Change Management

Document Control

Audit Management

Complaint Handling

Calibration Management

Employee Training

Others

#### Software Quality Assurance Market, By Deployment:

Cloud

On-premises

Software Quality Assurance Market, By Organization Size:

Large Enterprise

Small & Medium-Sized Enterprise

Software Quality Assurance Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Software Quality Assurance Market.

## Available Customizations:

Global Software Quality Assurance Market report with the given Market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional Market players (up to five).

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## **13. COMPANY PROFILES**

- 13.1. Honeywell International Inc.
  - 13.1.1. Business Overview
  - 13.1.2. Key Revenue and Financials
  - 13.1.3. Recent Developments
  - 13.1.4. Key Personnel/Key Contact Person
  - 13.1.5. Key Product/Services Offered
- 13.2. Digital Dream Forge
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  - 13.2.3. Recent Developments
  - 13.2.4. Key Personnel/Key Contact Person
  - 13.2.5. Key Product/Services Offered
- 13.3. QA Consultants Inc.
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  - 13.3.4. Key Personnel/Key Contact Person

- 13.3.5. Key Product/Services Offered
- 13.4. Oracle Corporation
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  - 13.4.4. Key Personnel/Key Contact Person
  - 13.4.5. Key Product/Services Offered
- 13.5. Cognizant Technology Solutions Corporation
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  - 13.5.5. Key Product/Services Offered
- 13.6. Microsoft Corporation
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  - 13.7.1. Business Overview
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- 13.8. Parasoft Corporation
  - 13.8.1. Business Overview
  - 13.8.2. Key Revenue and Financials
  - 13.8.3. Recent Developments
  - 13.8.4. Key Personnel/Key Contact Person
  - 13.8.5. Key Product/Services Offered

## **14. STRATEGIC RECOMMENDATIONS**

## **15. ABOUT US & DISCLAIMER**

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