WORLD QUALITY REPORT

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Eastern Europe

Victor Isopescu
Head-Global Delivery Center,
Capgemini Romania

Jerome Cadiou
Managing Director,
Capgemini Hungary

IMPORTANT TRENDS

- The increasing adoption of test automation is one of the most noticeable trends in the region.

- An average 15% of all projects in Poland, 18% in Hungary and 17% in Czech Republic are using Scrum methodologies as compared to a worldwide average of 16%.

- One of the biggest challenges facing the region is a lack of the required competencies among QA and Testing professionals.

There are two things one must keep in mind when trying to understand the QA and Testing market in Eastern Europe. The first is that the region's economy has been doing fairly well, with growth rates well above the EU averages. The second factor is that Eastern Europe, with its abundance of human capital and its proximity to the developed markets of Western Europe, is a favored investment and outsourcing destination, hosting a number of Shared Service Centers (SSCs). Taken together, these two factors help explain some of the major QA and Testing trends in the region.

These trends are mostly the same as those seen last year, though several have intensified since then. One of the most noticeable trend in this regard is the increasing adoption of test automation. It is mainly the highly industrialized SSCs located in these countries which are driving this trend. As with the rest of the world, this is driven by the need to reduce costs. However, there are certain factors peculiar to Eastern Europe that add further weight to this trend. One factor is the shortage of skilled IT professionals, which makes automation even more attractive in this region. The second is the very nature of these SSCs which are built around the concepts of consolidation, cost reduction and optimization. Taken together, both these factors have led to a steep rise in automation activity over the last one year.

However, Eastern Europe still lags behind the rest of the world in terms of the maturity of its test automation practices. When asked about the main challenges in achieving their desired level of automation, respondents gave the highest ranking to factors such as "a lack of the appropriate automation tools", "lack of the right automation testing process or method", and "difficulties in integrating different automation tools together". Underlying all three is a lack of the required competencies, which is the second big trend in the region today.

This lack of skills is apparent in a number of the QA and Testing trends today. One part of this is due to the growth rates in these countries and the healthy situation of the IT industry. IT professionals are in demand, salaries are going up and organizations are under increasing pressure to recruit and retain the right talent. In addition, for QA and Testing in particular, some of the latest technological trends have caused a shift in the required skill sets. The era of the basic manual tester is over and organizations are looking for testing professionals having a diverse range of skills. Testers today need to be able to handle tasks such as managing test environments, implementing automation tools, developing and reviewing code as well as pro-actively communicating and working in smaller, multi-disciplinary teams. Finding such talent is becoming increasingly difficult, thus adding to the shortage.

This also shows up in our survey results. When asked about the greatest challenge in testing mobile and multi-channel applications, as many as 43% respondents in Czech Republic and 47% in Poland cited 'no mobile testing experts'. The corresponding worldwide average was 42%. Similarly, when asked about the key challenges in implementing automation, 48% respondents in Hungary and 43% in Poland, as opposed to a worldwide average of 40%, cited the lack of skilled and experienced test automation resources.

To a large extent, it is the heavy adoption of agile and DevOps in the region which is responsible for this shortage. However, since Eastern Europe is a few years behind the curve in terms of agile adoption, the impact of these methodologies is seen to a greater extent in the newer projects under development. Approaches such as Scrum and the Scaled Agile Framework (SAFE) are particularly popular. According to our survey, as many as 15% of all projects in Poland, 18% in Hungary and 17% in Czech Republic are using Scrum methodologies. As compared to this, the worldwide average is 16%.

At the same time, there remain a number of challenges in applying testing to an agile environment. Our respondents pointed to the lack of a good testing approach that fits with the agile development method, the lack of professional test expertise in agile teams and the lack of appropriate test environments and data as the three top challenges faced by them. Similar trends are also seen in the adoption of DevOps, where again, the region is fast catching up with the rest of the world.

The rapid adoption of these frameworks is also leading to important changes in the organization of testing activities. As seen in last year's report, the region still lags behind the rest of the world in terms of decentralization of testing activities. According to our respondents, the use of a Test Excellence Center (TCoEs) was the most common way of setting up test activities in the region. Using crowdsourcing solution model for quick test capacity and setting up of hybrid TCOEs were the next two popular options. In short, we are right at the beginning of a wave towards the decentralization of testing activities, a trend that is expected to strengthen considerably over the next few years.

Another trend that is likely to become very important over the next one year is security testing. Part of this is driven by trends such as digitalization and a couple of recent, highly publicized security leaks. In addition, regulations such as the Revised Payment Service Directive (PSD2) and the General Data Protection Regulation (GDPR) have led to tougher security standards that need to be met, especially for the financial services industry. These concerns over security also showed up in our survey. For instance, when asked about the objectives of their IT strategy, Polish respondents gave the highest weighting to 'enhance security', while Czech respondents ranked it third among their list of priorities. Similarly, when asked about the areas on which they focus their attention when testing mobiles, almost 50% of Hungarian respondents and 48% of Czech respondents (as opposed to a worldwide average of 43%) picked security.

Taken together, all of these trends suggest that QA and Testing in Eastern Europe is at an inflection point. In the coming years, these developments will not only change the face of QA and Testing in the region, but will also help it to catch up with the rest of the world.

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If you desire more information about testing tools, please contact

Toby Marsden, EMEA ALM Business Leader
toby.marsden@microfocus.com, +44 7867 526374