

BRESSER CONSULTING & ASSOCIATES

CREATING COACHING CULTURES ↗

Bresser Consulting Report

Results of the
European Coaching Survey 2007/8

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Bresser Consulting & Associates – Creating Coaching Cultures

Ehrenfeldguertel 151, 50823 Cologne, Germany

info@bresser-consulting.com www.bresser-consulting.com

Tel. +49 (0)2 21 – 5 70 86 42 Fax +49 (0)2 21 – 5 70 86 43 Mobile +49 (0)1 79 – 4 33 88 76

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Executive Summary

This report presents the results of the *European Coaching Survey 2007/8*, which, for the first time, systematically examined the current situation of coaching in Europe as a whole and in each European country and region.

Coaching associations, coaching providers and universities throughout Europe were asked to fill out a detailed questionnaire about the coaching situation in their country. Geographically, the project covered all EU and EU-candidate countries as well as a selected list of Non-EU countries.

As a general observation, there is a prevailing high diversity of coaching approaches, practices and development stages in the various parts of Europe. At the same time, internationalisation and convergence continue to play an important role. Overall, it may be argued and fair to say that coaching in Europe is somewhere between the US and Asian style of coaching.

We may assume, on the basis of the results, that there are about 16.000-18.000 business coaches currently operating in the European Union. UK and Germany - with nearly 30% of the EU population - seem to accommodate over 70% of all EU coaches (UK: 7500; Germany: 5000). UK and Ireland have the highest density of operating coaches (about 1 business coach per 8000 inhabitants).

Overall, there is a clear West-East and a slight North-South divide in the development of coaching within Europe. The Anglo region, the Founder Countries of the European-Community and Scandinavia, have an overall well developed coaching-industry. This is less true for the Mediterranean region - and even less the case for the former communist area. Within each of these regions, however, the practice and development of coaching may also differ enormously.

So indeed, there is no consistent picture of coaching in Europe yet. Diversity running in parallel (still) prevails. As a result, Europe is far from speaking with one voice as a coaching community, and it is not possible to talk about *the* European coaching approach yet.

The following figures reflect this diversity as well as the fact that coaching in Europe, while progressing steadily, is still a work in progress:

- In 12 of the 27 EU countries (all Western/Northern Europe), coaching is widely accepted and used as a business tool. In 11 EU countries it is not (this is also true for the three EU candidate countries). In the remaining other 4 countries this question is undecided.

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- In 11 EU countries, professional one-to-one business coaching is far advanced on its way to becoming a real profession in terms of accreditation, professional coaching bodies, code of ethics, etc. (in 10 EU countries it is not; 6 EU countries: undecided).
- The use of supervision is widely spread only in 7 EU countries (14: not widely spread; 6: undecided).
- In 5 EU countries a directive coaching approach is prevailing. In 9 EU countries a non-directive approach predominates. (13: undecided)
- The concept of coaching cultures is quite well known and widely used in 10 EU countries already - in 12 EU countries it is still hardly or not known at all. (5: in between)
- Depending on each country, there are highly different local characteristics and preferences in the way coaching is understood and delivered.

At the same time, there is no doubt that coaching is on the rise in the whole of Europe: In terms of the stages of a product life cycle of coaching, professional one-to-one business coaching is in the growth phase in 15 EU countries. In another 9 EU countries it is in the introduction phase. Just in two EU countries (Estonia, Latvia), coaching is still in the development phase. And only in one EU country (Netherlands) the coaching market is already starting to reach maturity. What's more, in none of the 35 European countries covered by the European Coaching Survey, coaching is in decline.

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A. The Project

The *European Coaching Survey 2007/2008* conducted by Bresser Consulting was aimed to find out what is the current situation of coaching in Europe and what are the commonalities and differences between national and regional coaching markets within Europe.

Coaching is one of the fastest growing business phenomena in Europe today. At the same time, specific research on coaching in Europe is nearly non-existent and we are only at the very beginning of understanding today's coaching dynamics and situation in Europe.

Research that already existed previously touched coaching in Europe only marginally or partly. The *European Coaching Survey*, for the first time, now systematically examined coaching in Europe specifically.

Coaching associations, coaching providers and universities throughout Europe were invited and asked to fill out a detailed questionnaire about the coaching situation in their country (see list of invited, participating organisations on p. 34/35). Geographically, the project covered all EU and EU-candidate countries as well as a selected list of Non-EU countries (see Figure 1).



Figure 1: Overview of the 35 European countries covered by the European Coaching Survey 2007/2008

- All 27 EU Members
- The 3 EU Candidate Countries
- A selected list of 5 Non-EU Members

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The results of the European Coaching Survey are presented in this report.

The research project was initiated and conducted by *Bresser Consulting - Creating Coaching Cultures*, a global provider of coaching and coaching culture services.

Bresser Consulting is renowned for its international, leading-edge research, e.g. in the field of implementation and improvement of coaching in organisations (Coaching Research Project 2005, Transatlantic Coaching Pilot Project).

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B. The Results

It is important to highlight that there are no formal statistics about coaching in hardly any European country yet. As a result, a number of answers given by the participating organisations in the survey could only be rough estimates. So, whilst the survey is indeed able to give you a good, first idea of coaching in Europe and in each European country and region, it is far from being absolute and impeccable.

1. General observations

On the basis of the survey results (and confirmed by the day-to-day experience in undertaking this research), it may be said that the nature of coaching in Europe is characterized by the following attributes:

a. Diversity of existing coaching approaches

There is a vast variety of different coaching approaches, practices and development degrees within Europe.

You find countries where professional one-to-one coaching is already very widely accepted and used as a business tool today (e.g. Sweden, France, Germany, UK) as well as countries where coaching is not yet accepted at all (e.g. Malta, Macedonia).

In some areas, coaching hasn't yet even entered the introduction phase (e.g. Estonia, Latvia), whereas elsewhere in Europe you find first signals of maturity of the coaching market already (Netherlands, Norway).

The coaching approach predominantly taken in each European country may range from directive (e.g. Greece, Portugal, Slovakia) to non-directive (e.g. Iceland, Belgium, Denmark, UK).

In some areas, coaching is already far advanced on its way to become a real profession in terms of accreditation, code of ethics, supervision and professional coaching bodies (e.g. France, Sweden, Switzerland, Germany, UK). Other regions within Europe are very far behind on this (e.g. Hungary, Russia, Ukraine).

Coaching industries in a number of countries have already gone far beyond one-to-one coaching and are familiar, for example, with the coaching culture concept (e.g. Netherlands,

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Luxembourg, Sweden). In contrast, there are countries where very few coaches know this concept at all (e.g. Switzerland, Macedonia, Poland).

Last but not least, depending on each country, there are many different local characteristics and preferences in the way coaching is understood and delivered. For example, in some countries coaching may generally be more relationship- (e.g. Sweden) or emotion-based (e.g. Russia). In others there may be a great reluctance towards coaching by phone (e.g. Turkey, Italy, Ireland). Again in others, a very good knowledge of and feel for the national culture and values may be required to access the coaching market (e.g. Portugal, Norway).

Even within particular areas within Europe (e.g. Scandinavia, Baltic states) you partly find great differences in the practice and development stage of coaching.

So diversity is definitely a key part of the nature of coaching in Europe. This situation doesn't allow to speak of a consistent, coherent European coaching understanding yet, but rather gives the impression of some kind of a patched quilt.

b. Internationalisation and convergence

Given this great diversity of different coaching approaches, another element of coaching in Europe may not be overseen: there is a high degree of internationalisation and continuous convergence in the field.

Originally, coaching came to Western Europe from the US in the 80s, and it was definitely an international US trend at that time. However, within Western Europe, coaching underwent highly different local changes and adjustments in the various European countries in the following 20 years. And in many countries national coaching associations increasingly defined coaching autonomously.

But at any time, however, there has always been a substantial international dimension to coaching, be it through international coaching associations, international coaching conferences or multinational companies implementing international coaching programmes.

What's more, the diversity of national coaching approaches has increasingly become a source of mutual inspiration and learning for each other. Once national coaching industries have gone through this process of self-discovery, they now can discuss with each other at a more mature and advanced eye level. Accordingly, openness and curiosity to work together, sharing experiences and establishing best practices internationally (e.g. regarding code of ethics, good contracting, universal coaching principles, supervision, clear distinction to other disciplines) have always been present in some way.

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Then, after the fall of the wall, coaching also slowly started to reach the East European countries more and more. These are now either in the early process of adopting international coaching (often with the support of international coaching associations) or have already started their own journey of defining and developing coaching more locally.

Today, international coaching associations like AC, ICF, EMCC or ECA are increasingly founding national branches or chapters throughout Europe. At the same time, they collaborate more and more with each other.

However, Europe is still far from having its own official European umbrella coaching association and from speaking with one voice as a coaching community. It remains very difficult to talk about *the* European coaching approach. The diversity of approaches running in parallel still clearly prevails.

c. In between the US and Asian style of coaching

When comparing the existing European coaching approaches with common, classic coaching approaches in US and Asia, the following comments may seem appropriate:

It is often said that in the US, there is traditionally a highly individualistic coaching approach that, above all, focuses on the power of the individual to determine its own fortune. In contrast, in Asia a more collective attitude in coaching is said to predominate: the individual person highly defines him/herself through the group he/she belongs to. Now, in Europe there seems to prevail a midway approach between the two: there is a focus on the individual power, but the high integration of social and systemic thinking ensures that the collective interests are adequately taken into consideration at any time.

Furthermore, the US coaching style is seen as very direct in terms of communication and openness, whereas it is considered to be highly indirect in Asia due to the cultural principle of saving face. Europe seems to be somewhere halfway between the poles: the coaching style is only moderately direct or indirect.

Last but not least, coaching is often branded very positively in the US, and having a coach is frequently seen as a status symbol. In contrast, in Asia, coaching is rather perceived in a remedial way, and a more directive approach is prevailing. In Europe you find more of a mix and combination of both approaches.

So, on the basis of these observations, it may be fair to say that in comparison with the US and Asian styles of coaching, the “European coaching approach” seems to be somewhere in between the two.

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2. Facts and Figures

Let us now have a closer look at the concrete results of the survey.

2.1. State of coaching in Europe

Based on the results of the European Coaching Survey, we may assume that there are about 16.000-18.000 business coaches operating in the European Union. This seems to be rather compatible with the often-quoted number of about 50.000 coaches operating worldwide.

Interestingly, UK and Germany - with nearly 30% of the EU population - seem to accommodate over 70% of all EU coaches. In UK, the given rough estimate of about 7500 business coaches would mean an average of 1 business coach per 8.000 inhabitants, which would mean the highest density in the whole EU (together with Ireland). In Germany, the estimated number of about 5000 business coaches would mean 1 coach per 16500 inhabitants, which would still be one of the highest densities in Europe. France comes third in terms of number of coaches (over 1000 coaches; 1/64.000 max), Italy fourth (700-1000 coaches, 1/59.000-84.000).

In the three EU candidate countries (Croatia, Macedonia, Turkey) coaching is still in its infancy with only about 50 professional business coaches altogether. Outside the EU the situation is not homogenous: for example in Russia and Ukraine the number of coaches is extremely small, whereas in Norway (200) and Switzerland (300-500) you find highly developed, vivid coaching industries.

Overall, there is a clear West-East and a slight North-South divide in the development of coaching. The Anglo region, the Founder Countries of the European-Community and Scandinavia, have an overall well developed coaching-industry. This is less true for the Mediterranean region - and even less the case for the former communist area. Within each of these regions, however, the practice and development of coaching may also differ enormously.

The following figures may clearly reflect this European diversity as well as the fact that coaching in the EU, while progressing steadily, is still a work in progress:

- In just 12 of the 27 EU member states (all Western/Northern Europe), coaching is already widely accepted and used as a business tool. In 11 EU countries it is not (this is true also for the three EU candidate countries). In the remaining other 4 EU countries this question is undecided.

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- Only in 11 EU countries coaching is far advanced on its way to becoming a real profession in terms of accreditation, professional coaching bodies, code of ethics, etc. (10 EU countries: not advanced; 6 EU countries: undecided).
- The use of supervision is widely spread only in 7 EU countries (14: not widely spread; 6: undecided).
- In 5 EU countries a directive coaching approach is (still) prevailing today (Greece, Ireland, Latvia, Portugal, Slovakia). In 9 EU countries a non-directive approach predominates. (13: undecided)
- The concept of coaching cultures is quite well known and widely used in 10 EU countries already - in 12 EU countries it is still hardly or not known at all. (5: in between)
- Depending on each country, there are highly different local characteristics and preferences in the way coaching is understood and delivered.

So in fact, there is no consistent picture of coaching in Europe. At the same time, there is no doubt that coaching is on the rise in the whole of Europe (see Figure 2). In terms of the stages

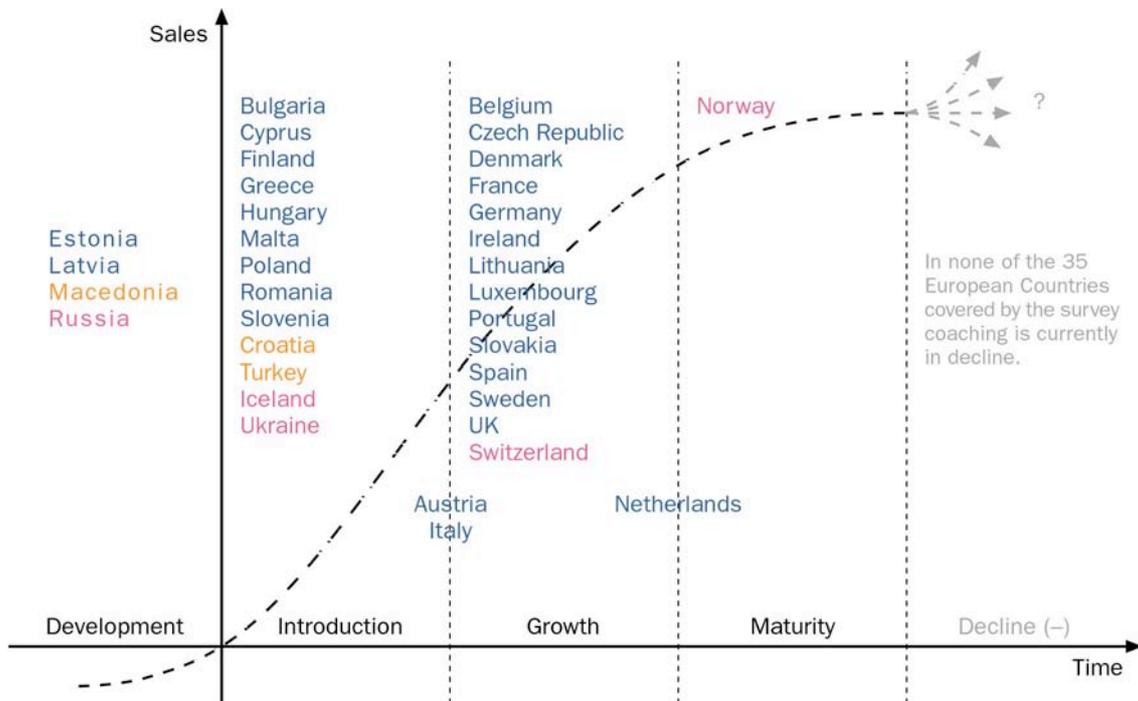


Figure 2: Current product life-cycle stage of coaching in the 35 European countries covered by the European Coaching Survey

- EU Member
- EU Candidate Country
- Non-EU Member

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of a product life cycle of coaching, professional one-to-one coaching is in the growth phase in 15 EU countries. In another 9 EU countries it is in the introduction phase. Just in two EU countries (Estonia, Latvia), coaching is still in the development phase. And only in one EU country (Netherlands) the coaching market is already starting to reach maturity. What's more, in none of the 35 European countries covered by the European Coaching Survey, coaching is in decline.

Let us now have a closer look at the various key-coaching aspects examined in the European Coaching Survey in detail (see next pages).

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a. Acceptance and use of coaching

Only in 12 of the 27 EU countries (all Western/ Northern Europe), coaching is already widely accepted and used as a business tool. In 11 EU countries it is not (this is true also for the three EU candidate countries). In the remaining other 4 EU countries this question is undecided.

Question asked:
Is professional one-to-one coaching widely accepted and used as a business tool in your country today?

Results:



Figure 3: Acceptance and use of coaching in Europe

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c. Phase of coaching in its product life cycle

Coaching is on the rise in the whole of Europe. In 15 EU countries one-to-one coaching is in the growth phase, in another 9 EU countries it is in the introduction phase. Just in two EU countries (Estonia, Latvia), coaching is still in the development phase. And only in one EU country (Netherlands) the coaching market is already starting to reach maturity. In none of the 35 European countries covered by the European Coaching Survey, coaching is in decline.

Question asked:

Think of professional one-to-one coaching as a product with a classic product life cycle. In which phase of the life cycle, would you say, is coaching in your country?

Results (also see Figure 2 on p.11):



Figure 5: Current product life-cycle stage of coaching

(also see Figure 2 on p.11)

	EU Member States	EU Candidate Countries	Non-EU Members
1 Development	2	1	1
2 Introduction	9	2	2
3 Growth	15	-	1
4 Maturity	(1)	-	1
5 Decline	-	-	-
6 Relaunch	-	-	-
Total:	27	3	5

(1) Answer: "3 to 4"

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d. Directive/non-directive coaching approach

In 5 EU countries a directive coaching approach is prevailing (Greece, Ireland, Latvia, Portugal, Slovakia). In 9 EU countries a non-directive approach predominates. In 13 EU countries, this is undecided.

Question asked:
How directive / non-directive is typically the coaching approach taken in your country (e.g. do coaches give much advice)?

Results:



Figure 6: Directive/ Non-directive coaching approach in Europe

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e. Typical about coaching

Depending on each country, there are many different local characteristics and preferences in the way coaching is understood and delivered. For example, in some countries coaching may generally be more relationship- (e.g. Sweden) or emotion-based (e.g. Russia). In others there may be a greater reluctance towards coaching by phone (e.g. Turkey, Italy, Ireland). Again in others, a very good knowledge of and feel for the national culture and values may be required to access the coaching market – and so coaches from abroad highly struggle to succeed here (e.g. Portugal, Norway).

Question asked:

What do you think is typical (special) about one-to-one coaching in your country when compared with coaching in other countries (that coaches from abroad should be aware of when having clients in your country)?

(Answers to the open question “Other remarks?” at the end of the survey were also added here, as far as they addressed the above issue.)

Results:

The following table provides a shortened version of the answers given in each country. It may serve you as a source to look up your specific countries of interest. The list is less suitable to be read through as a whole.

EU Member States

1. Austria	Attempt of legal regimentation of coaching by chambers (commerce, counselling, therapy), though they do not coach. Thereby - for legal reasons - many coaches feel impelled to put on the hat of a consultant
2. Belgium	No major points to be aware of – we feel coaching is more about people and not countries <i>Other remarks:</i> Coaching is usually a facilitating process. From our point of view, coaching should be non-directive even if everybody knows that there is a time when the coach necessarily becomes directive. We think that supervision is one of the major criteria for a coach to be considered as a professional.
3. Bulgaria	Given the fact that the coaching is a relatively new profession and area of interest for Bulgaria, there is a need to pay attention to: - low awareness about the coaching profession in the wider community - making differentiation between coaches working according to high-quality standards and other non-specialized and non-accredited trainers - prevent any speculation in the public and media about the coaching profession
4. Cyprus	Nothing that should be mentioned here as specific to coaching. It is very similar to discussing the difference in culture between southern Europeans and that of northern Europe.

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<p>5. Czech Republic</p>	<p>Most people making use of professional coaching use to work in an international environment and I don't see any specific problem in this area. Coaching in the Czech Republic may sometimes tend to be either extremely directive or extremely psychological (even psychotherapy), and not so much in between. Successful Czech managers have experienced both: the best and the worst when it comes to business know-how from the west. The first wave of business expatriates that came to the Czech Republic from investing companies & countries in the early 90's has left a general feeling of disappointment at one point of their stay. There may be a tendency to take coaches from abroad with caution, sometimes with a cynical approach at first - due to this first-hand experience. A main problem is that the word "coaching" is more and more known in the business world, but people do not necessarily know what it really is.</p>
<p>6. Denmark</p>	<p>Coaching has a very good balance between company interests and personal coachee interests.</p>
<p>7. Estonia</p>	<p>The fact that coaching is not yet a widely developed field of activity in business requires a lot of client education.</p>
<p>8. Finland</p>	<p>Nordic leadership is less hierarchical and uses more dialogue and discussion. This has an impact on coaching.</p>
<p>9. France</p>	<p>HR managers tend to be overwhelmed by proposals from individuals who do not, according to us, meet the required credentials. They also tend to go back to the same suppliers only. Coaching in France seems to be closer to psychology than in other countries. There is a strong code of deontology. There are two main professional bodies (SFC and ICF) so far. Other professional associations tend to comprise younger coaches and do not play a major role in the field in France yet. <i>Other remarks:</i> We have to face and comment on a lot of beliefs regarding coaching we find also in the press and among officials. Our role is to make known what exactly coaching is, being it in the field of one-to-one coaching or team coaching.</p>
<p>10. Germany</p>	<p>Coaching in Germany is generally seen as a consulting form (in a one-to-one setting) provided mainly by external consultants. Coaching as part of leadership is regarded with reservation here (unlike in other countries).</p>
<p>11. Greece</p>	<p>The clients are typically not very goal oriented. They have their mind more on working on the day-to-day business rather than on reaching strategic objectives. There is a strong attitude of "what can I do?" that is holding them back from living their full potential, allowing others to influence their personal life and business results. <i>Other remarks:</i> Greece is generally strongly orientated at international mainstreams in the sense that many business people (in important positions) were studying or trained abroad. So they come back with the experience of coaching and coaching cultures in successful companies and want to implement what they learned. International firms also bring coaching to their Greek branches and thus help to spread its value continuously.</p>
<p>12. Hungary</p>	<p>There is a big difference regarding company culture based on ownership (multinational or domestic). In many cases, where the 'old' company was bought by a multinational, the leadership style of the owner is highly directive and only a limited freedom in decision-making is given to the domestic management. This has impact on the coaching process.</p>
<p>13. Ireland</p>	<p>I do not believe that we have anything that is fundamentally "special" at this time compared to other countries. Face to face coaching is more prevalent than telephone coaching: most organisations and executives expect that coaching be undertaken face to face. Many organisations are looking for Irish based coaches as members of their coaching panel and are looking to transition from hiring especially executive coaches from overseas. Some organisations are introducing coaching as a "benefit" to employees with the provision of an external coach and there being no requirement for the coach to connect back to the business and with no involvement of the line manager/HR person/coachee/coach in agreeing objectives. There are a small number of corporate organisations that have been embedding coaching in their business as a tool to support business development, talent management and organisational performance for over 10 years. <i>Other remarks:</i> There are few coaches whose practice is solely coaching with many people also providing consulting and training. / Team coaching is in its infancy.</p>

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14. Italy	Mostly face to face
15. Latvia	Information on coaching in Latvia is not widely available. Also, by those who heard of it, the coaching concept is not yet completely comprehended. Therefore, many clients confuse one-to-one coaching with consulting and expect to receive concrete advice and recommendations. <i>Other remarks:</i> In my opinion, there is a need for a coaching association in Latvia.
16. Lithuania	Clients do not understand what coaching is and how to choose a good coach. Because of this, many consultants start to work as coach, without special coach education.
17. Luxembourg	There is a multi-cultural environment (Luxembourg mother companies, which are more traditional, and multinational companies the headquarters of which mostly are abroad which means they are more open to the use of coaching) and multi language environment (most common work languages for coaches: French, English, Luxemburgish, German, Dutch). The majority of the workforce doesn't live in Luxembourg (commutes daily from France, Belgium or Germany).
18. Malta	Malta tends to be a highly prescriptive culture.
19. Netherlands	We have many coaches who just use the word coach because it is fashionable. I also see the tendency of "coaches" not only in terms of coaching as a profession, but more as a tool, because a lot of people see coaching as a tendency. This confusion of terminology is problematic.
20. Poland	We only have few coaches for top business people.
21. Portugal	Portugal is a very conservative country. A coach must feel our culture, values and so on. Few of foreign coaches are working here with success. <i>Other remarks:</i> A small, but strong group of people are running the good practices in coaching. We believe we are growing slowly, but with a good code of ethics and open-mindedly.
22. Romania	It is a new tool.
23. Slovakia	More information is needed on what coaching is. Most of Slovak managers expect, that the coach is an advisor or trainer. So coaching is seen as a one-to-one training or one-to-one advising. That means the one-to-one setting is considered to be the only difference between these methods / ways of support. The border between coaching, mentoring, training, advising (or consultancy) and psychotherapy has been quite unclear in Slovakia (compared with other countries) so far. Also coaching is seen in a more remedial way here (more about problems, finding faults). Slovak top managers (and company owners) seem to be afraid of having a personal coach themselves. Instead they ask the external coach just to coach other employees. The attitude is mostly "I am O.K., they are not O.K." <i>Other remarks:</i> There are a lot of investments going on by multinational companies in Slovakia. These businesses bring in some coaching understanding. Historically, a very directive approach has been used in management and this style is still prevalent (as well as the expectations of people being managed).
24. Slovenia	Coaching is becoming increasingly popular, but the majority of potential clients is still not sufficiently aware of what constitutes coaching and what doesn't. There is still a lack of belief in the value of coaching.
25. Spain	No answer
26. Sweden	Our business culture is built on an old tradition between the trade unions and the employers association. This has given our workforce a strong platform and has built good working habits. People feel secure and sometimes a bit too secure to take on new challenges and risks. We rely on other people to take on the responsibility for our own development. This, together with a strong dominance of engineering, forest and mining industry, has given our workforce the character of today. With the influence of EU, migration and the fact that a lot of our companies are partly owned by multinational companies are slowly changing the map.
27. United Kingdom	Insufficient evidential research available

EU Candidate Countries

28. Croatia	<i>No answer, but other remarks:</i> This is an exciting time for the coaching profession in our region – coaching is becoming increasingly present in the media and in HR events and conferences.
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29. Former Yugoslav Republic of Macedonia	<p>Don't know of any professional one-to-one coach trainers here. <i>Other remarks:</i> Management seminars, trainings as well as professional one-on-one coaching are very difficult to sell here, since business people in high positions usually do not see the benefit of education. Even if they do, they do not really like to pay for it. There are lots of foreign organizations and projects offering different kinds of trainings for free - and businesses use that.</p>
30. Turkey	<p>Face-to-face sessions are being preferred (99%). The age of the coach is being considered in the advantage of older coaches. Because of Turkish culture and traditions, people do not talk about everything. There are still taboo subjects. <i>Other remarks:</i> The Turkey population is over 70 million and I believe max. 10% of these people have heard about coaching and 2% of them have got the right information. Happily, the people who have the right info are demanding the right quality.</p>

Non-EU Members

31. Iceland	The industry is just starting off.
32. Norway	<p>Norwegians like to do things in their own way. We like coaching skills to be Norwegian. We accept coaching as a development tool.</p>
33. Russia	<p>Coaching is more feelings-oriented, rather than behaviour-oriented. <i>Other remarks:</i> Coaching contracts mainly from European and US companies, also from big Russian companies run by very advanced CEOs and HRs. The difficult side of our reality is that there is no support for coaching from state organisations. State universities consider coaching to be in competition with consulting and psychotherapy. To develop coaching in our country, it takes big efforts and financial investments. During the last 5 years, our company has organised and sponsored coaching events to help promote and develop professional coaching in Russia.</p>
34. Switzerland	<p>Many different coaching styles mean different approaches and meeting different needs of clients. Therefore no general recommendations are possible. In Switzerland it is an important rule to be able to show an official recognition such as a Diploma SCA, SAV or BSO.</p>
35. Ukraine	<p>The training and personal development market in Ukraine is still non-segmented and not specialized. Therefore, the same training companies offer the wide range of different programs & products including coaching support (executive coaching, strategic planning coaching, team coaching, leadership coaching, individual coaching, life coaching) without distinguishing them for potential clients. Very often managers (including HR & Training Managers) don't make a clear distinction between consulting, training and coaching, so it creates some misunderstanding of why, how and when these services can be used. Very often coaching is used as a part (or a stage) of consulting services and training programs. One-to-one coaching is mainly requested by transnational (1) and very big national (2) companies; foreign managers prefer to work with foreign coaches (especially executive coaches). The professional coaching community in Ukraine is purely structured.</p>

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f. Use of supervision by coaches

The use of supervision is widely spread only in 7 EU countries (14: not widely spread; 6: undecided).

Question asked:
Do many coaches in your country
make use of supervision (/coach the coach)?

Results:



Figure 7: Spread of supervision (/coach the coach) in Europe

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g. Coaching on its way to becoming a real profession

Only in 11 EU countries (mainly Western/Northern Europe), professional one-to-one coaching is far advanced on its way to become a real profession in terms of accreditation, professional coaching bodies, code of ethics, etc. (10: not advanced; 6: undecided).

Question asked:
Is one-to-one coaching already far advanced on its way to becoming a real profession in your country (in terms of accreditation, professional coaching bodies, code of ethics, etc.)?

Results:



Figure 8: Coaching on its way to becoming a real profession in Europe

	EU Member States	EU Candidate Countries	Non-EU Members
++ Agree strongly	2	-	-
+ Agree	9	-	2
o Undecided	6	-	1
- Disagree	7	2	-
-- Disagree strongly	3	1	2
Total:	27	3	5

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Follow-up question:
“Explain your answer to the previous question” (see page 22)

Results:

The following table provides a short version of the answers given in each country. It may serve you as a source to look up your specific countries of interest. The list is less suitable to be read through as a whole.

EU Member States

1. Austria	The existing coaching bodies are nearly unknown. Clients know few about existing accreditations and ethical standards.
2. Belgium	There is a strong demand about legal recognition, but it is not there yet. Most of the enterprises refer to organisations such as ICF, ECA and EMCC to validate their choices.
3. Bulgaria	Bulgaria is going to have an official ICF chapter soon. A project about creating it was prepared and signed by some coaches in Bulgaria. The support and opportunities given by an international coaching association (ICF) are very important. We believe that through networking and through connecting Bulgarian coaches to their colleagues from around the world, we will be able to promote professional coaching at a high quality.
4. Cyprus	At the moment, I am not aware of any movement for coaches to get together and create a local group, but I hope this will change soon.
5. Czech Republic	For 4-5 years, we have been having our own association of coaches (Czech Association of Coaches, CAKO), which for example has its own code of ethics. In 2006 we started to provide accreditation, and now more and more well educated, experienced and respected coaches are joining the association. The International Meeting of Coaches in September 2007 has hopefully let the professional coaching world hear and know about the growing coaching and coaching culture movement we find in central Europe. Thanks to its great publicity (national TV, radio and business press), it has definitely helped raise the local public awareness of coaching. Two bodies are officially organising accreditation procedures and claim to stand for code of ethics in coaching (ČAKO as the Czech Coaching association and the Czech ICF Chapter). I believe an EMCC body has been set up in September this year. Having said that, the coaching community is still on its way. For example, it is not possible to agree on what coaching actually is. Coaching is at an early stage of development where standardisation processes are yet to come in two or three years' time.
6. Denmark	No answer
7. Estonia	There are a lot of consultants who work one-to-one, but only a few of them engage in the work methods applicable to coaches.
8. Finland	No answer
9. France	There are two main professional bodies (SFC and ICF) - having high-quality accreditation processes and codes of ethics. Other professional associations tend to comprise younger coaches and do not play a major role in the field in France yet.
10. Germany	(Accreditation, codes of ethics and professional coaching bodies at a high level of development.) In September 2007, the DBVC, a leading coaching association, passed a coaching-compendium providing guidelines for the further development of coaching as a profession. All DBVC members have accepted these guidelines as binding professional standards for their work.
11. Greece	There doesn't exist any (official) professional coaching body yet in Greece. The profession of coaching is introduced, but not referred to officially. Acknowledgment through the state has not happened yet. A coach will be registered as a Business Consultant/Counsellor at the tax office without any further requirement of proof that he/ she is knowledgeable in their profession.

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	Most coaches are self-pronounced coaches, which normally means that they were working in another profession before (like therapist or in a management position) and today call themselves coaches without having had the necessary training to be good representatives of the profession. But there are also a number of internationally (USA and UK mostly) trained coaches who certainly fulfil the standards of knowledge and ethics.
12. Hungary	There isn't any professional coaching education, and only a limited number of coaches have international accreditation (my estimation is less than 5). A professional coaching body started its activity just a few months ago (I am the president of the organisation). All the frameworks (including code of ethics, membership in international organisations) will be set up in the next few months / next year.
13. Ireland	With the launch of the Association for Coaching in Ireland in 2007, we have found particular interest in the subject of accreditation (especially among forward thinking HR departments). A new organisation has recently established itself in Ireland – the Irish Coach Development Network (www.icdn.ie) whose goal is: “to work with the relevant educational institutions, coach training organisations, coaching associations and coaches on the co-development of an independent, national framework for the development and accreditation of professional Life & Business coaches in Ireland”.
14. Italy	We are still establishing the coaching profession and informing potential clients about its solidity.
15. Latvia	At the time being, certification for one-to-one coaching can only be obtained outside of Latvia. We also do not have a Latvian Coaching Association yet that could promote coaching and develop a code of ethics, standards and qualifications for coaching here.
16. Lithuania	I think that we need 2-3 years to bring about real coaching understanding in our country. But we believe we will do that. We open a coaching school next month and bring the coaching culture into our country.
17. Luxembourg	We founded our association in Luxembourg in 2006. We have defined a code of ethics and an accreditation process. Since, we have accredited 10 professional coaches and we begin to be contacted by HR professionals to support the implementation of a coaching culture in their organization. We recognize, however, that we still have a long way to go to support the development of coaching in Luxembourg (regarding the clients as well as the coaches themselves).
18. Malta	The profession is still in its infancy and as such there is no regulation.
19. Netherlands	ICF Netherlands has been working for a year to educate people on the importance of coach education (also after certification). We notice that a lot of our members are becoming members because of the ICF certification. The good coaches are definitely working on making a profession out of coaching.
20. Poland	We are just starting ICF in Poland.
21. Portugal	We are doing the first steps towards the accreditation and organization of coaching in Portugal.
22. Romania	A lot is happening. Using my own example, I write articles and give info on ICF accreditation.
23. Slovakia	Only few coaches are members of the Slovak Association of Coaches (SAKO, formed in 2006) and the ICF Chapter Slovakia (formed in 2007) to help set standards and promote coaching as a profession. The SAKO co-operates very closely with the ICF Chapter Slovakia. Each SAKO member has accepted the ICF Code of ethics. We are building the ICF chapter together, and we are preparing for the ICF credentialing and accreditation process. One of SAKO's goals is the preparation of the credentialing and accreditation process for its members and the accreditation of coaching training programmes.
24. Slovenia	We are facing a shortage of good, solid coaching training programmes, because we are familiar only with basic NLP techniques.
25. Spain	From the 197 members of ICF only 24 hold an ICF International Credential. Other 30 members are currently undergoing credentialing processes.
26. Sweden	Coaching is present in the market and the media; management has realised its potential; long term commitment and continuity within the trade organisation (ICF); the number of coaching companies is growing.
27. United Kingdom	All the factors mentioned above apply (accreditation, professional coaching bodies, code of ethics). There are 6+ coaching bodies in UK, which collaborate, to some extent, on agreeing standards, code of ethics and approaches to supervision and accreditation. As yet there is no Chartered Institute and I believe that this may not happen, as the Chartered Institute of Personnel and Development is also involved with coaching, although at present their focus is mostly on coaching skills for managers. Currently the industry is self-regulating and membership of any professional body is voluntary. The drive towards recognition of the industry as a profession is strong. Membership of the Association for Coaching and other coaching bodies is growing fast, which encourages self-regulation.

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EU Candidate Countries

28. Croatia	There is no formal professional coaching association yet. The first initiative for a coaching network has just been launched. Two first meetings have now been held discussing ethics, accreditation etc. (as well as exploring the benefits of joining an international coaching association as a local chapter).
29. F.Y.R. of Macedonia	No answer
30. Turkey	As ICF we strongly emphasize that this is a profession. However, there is not high awareness of the coaching concept in Turkey. Although it is being accepted that coaches need a special training to serve this profession, there are untrained coaches who just call themselves coaches.

Non-EU Members

31. Iceland	Coaching as a profession is just starting off here.
32. Norway	Norway started its own development of standardization in 2006. This project was stopped in September 07 due to cultural differences between the coaching education bodies. The ICF tries to promote its code of ethics, standards and accreditation levels.
33. Russia	Accreditation is not a value yet for consultants who work as coaches: Most of them haven't completed a coach training at a professional coaching school. From their point of view, it's enough to read some coaching books and use their own coaching approach. They use coaching / work as a coach with their existing clients, so for them it's not necessary to sell themselves as professional coaches. There are only few people who completed a high-quality coaching training/accreditation. As there is not a real coaching market yet, it's difficult for beginners to get clients.
34. Switzerland	Our Association is growing quite rapidly, and we provide standards of ethics as a recognized code of conduct. Our internal Exams for Coaches are one of the well-considered Diplomas for Coaching. Soon we shall have a federal recognition of Switzerland for this (Post Grade) Diploma. Other very good educations for coaching are provided by some Universities (like HAP Zurich, FH Olten). In our Association we count an increasing number of well-considered full time coaches.
35. Ukraine	The coaches I have known, have either had a chance to work with or have found information about have been certified by international organizations and/or institutions. Though the Ukrainian Coaching Federation (www.ucf.com.ua) was established in March 2007, this organization is practically unknown in the training/ learning/coaching market. The organization's website doesn't provide information about UCF members or, at least, certified coaches. National certification / accreditation of coaches and developing a code of ethics are the most vital and important issues to address.

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h. Spread and use of the concept of “coaching cultures”

The concept of coaching cultures is quite well known and widely used in 10 EU countries already - in 12 EU countries it is still hardly or not known at all. (5: in between)

Question asked:
How well known and widely used
is the concept of “coaching cultures” in your country in the
coaching industry on a scale of 1 to 10
(1=not at all, 10=very much)?

Results:



Figure 9: Knowledge about and use of the rather new coaching culture concept

	EU Member States	EU Candidate Countries	Non-EU Members
1	not at all	2	1
2	10	1	1
3	3	1	3
4	2	-	-
5	5	-	-
6	3	-	-
7	1	-	-
8	(1)	-	-
9	-	-	-
10	very much	-	-
Total:		27	3

(1) Answer: "8 to 9"

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2.2. Geographical areas within Europe

After having a look at the whole of Europe, let us now revisit various geographical areas within Europe and see what more can be said about these.

a. Comparison: UK and Germany

As UK and Germany are the biggest coaching markets (about 7500 and 5000 coaches), let us first have a closer look at them.

Both coaching industries are highly developed. Coaching is far advanced on its way to becoming a real profession in terms of accreditation, code of ethics and supervision. However, there is an interesting difference regarding professional coaching bodies:

In the UK there are only few (6+) professional coaching bodies of which the major ones are the AC, the ICF and the EMCC. They are, what's more, in a process of collaboration through a round table. In Germany, in contrast, you find a tremendous number of coaching associations (only the major ones: more than 20). These are highly competing with each other, and only few initiatives to collaborate have been successful.

Regarding a comparison of the coaching approaches in UK and Germany, the *Coaching Research Project 2005* - undertaken in the field of the implementation of coaching in organisations in 2005 - already touched this question and found out the following (Bresser, 2006a, 2006b; Bresser Consulting, 2006):

- The prevailing coaching approach in Germany in 2005 was directive. Many clients required specific expertise from coaches in the field in which they were coaching, and expected advice in the coaching session. This fairly contrasted with the Anglo UK understanding of coaching which provided a much clearer distinction between coaching and consulting, and was much more, if not purely, process-oriented.
- Also, at that time, in Germany coaching was primarily only discussed and implemented in the forms of one-to-one and team coaching, whereas in the UK, coaching was already also a hot topic in the context of leadership and business and management culture.

Now, interestingly, the results of the European Coaching Survey do not fully confirm this any more, as far as Germany is concerned. Things are in a steady flux, and this seems to be particularly true for the German coaching market, which obviously has opened up and evolved in recent years: The typical, predominant coaching style in Germany cannot be

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regarded as just directive any more, but is today undecided between directive and non-directive. Also, though it is true that in Germany a coaching leadership style is still seen with a degree of reservation, there is a change going on as well: The concept of coaching cultures for example is now - as opposed to some years ago - increasingly becoming known and used in Germany. (Bresser and Schollmeyer (2008) can also confirm this.)

b. France, Italy, Netherlands, Belgium, Luxembourg

All founder countries of the European Community (including Germany) have well-developed, growing coaching industries. France (1000 coaches minimum) and Italy (700-1000) are third and fourth in terms of number of operating coaches.

However, there are also important differences: in the Netherlands growth is starting to turn now into maturity. Whereas coaching is widely accepted and used as a business tool in France, Italy, the Netherlands and Belgium, this is obviously not so much the case in Luxembourg. Also, coaching is less far advanced on its way to becoming a real profession in Luxembourg and in particular this is also true in Italy.

The overall Belgian and French coaching approach is non-directive, while in the other countries there is more of a mix of both directive and non-directive elements. Supervision is seen as highly important in France, Belgium and Luxembourg, which applies less to the Netherlands - and in Italy supervision is even less used. Whereas the coaching culture concept is well known and used in the Netherlands, Luxembourg and France, this seems less the case in Italy and not at all true for Belgium.

Regarding typical coaching approaches, an overall more international way of coaching can be found in Belgium, Luxembourg and the Netherlands due to their highly international, multi-cultural environment. Coaching in France is closer to psychology than in other countries, and a good code of ethics is seen as particularly important. Finally, in Italy, you find a high preference towards face-to-face coaching.

c. Spain, Portugal, Greece, Malta, Cyprus, Turkey

In the region of these Mediterranean countries plus Portugal, we find an ambivalent situation: Coaching is widely accepted, used as a business tool and far advanced on its way to become a real profession in Spain and Portugal. In Greece, Cyprus, Malta and Turkey it is not (e.g. no

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coaching bodies exist). Coaching is in the growth phase in Spain and Portugal, but still in the introduction phase in the remaining countries.

What is common to this region, however, is that supervision doesn't play a major role in any of these countries. Also the coaching culture concept is, so far, rarely known and used in any of these countries. What is more, the number of coaches is generally very low in this region. This is also true for Portugal (30) where we find a small, but strong group of coaches. In Spain there are (only) about 300 coaches.

Regarding the coaching style, it is predominantly directive in Greece and Portugal and rather non-directive in Cyprus, Turkey and Malta. In Spain this is undecided. In terms of cultural differences it is important to know that in Turkey, face-to-face sessions are preferred, the age of the coach is a factor and a number of cultural taboo subjects do exist. In Portugal, a coach must be able not only to understand, but also to feel the traditional, national culture and values – which makes it highly difficult for foreign coaches to succeed in Portugal. In Greece the clients are typically not very goal-oriented: they have their mind more on working on the day-to-day business rather than on reaching strategic objectives. There is a strong international influence on coaching, though.

d. Denmark, Sweden, Norway, Finland, Iceland

It is sometimes suggested that within Europe the Scandinavian culture would be the nearest to and most compatible one with the idea of coaching. When having a look at the figures of the European Coaching Survey, we find this neither fully confirmed nor disproved:

In fact, coaching is widely accepted and used as a business tool in Sweden, Denmark, Norway and Finland. It is less accepted and used in Iceland, where coaching is just starting off. In Sweden, Denmark and Norway, coaching is also far advanced on its way to becoming a real profession. However, this is less true for Iceland, and still less for Finland. The number and density of coaches in Scandinavia is high, but definitely not the highest within Europe (Sweden: about 500 coaches; Norway: 200; Denmark: 50; Finland: 100; Iceland: 10).

Also, whereas coaching has already reached maturity in Norway and is in the growth phase in Sweden and Denmark, it is still in the introduction phase in Finland and Iceland. The concept of coaching cultures is quite well known and widely used in Sweden and Denmark already - in Norway and in particular in Finland and Iceland this is (much) less the case. Supervision plays an important role in Denmark and Iceland, but is of less significance in Sweden and Norway and still less used in Finland.

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Interestingly, there is no directive coaching approach prevailing in any of these countries: In Iceland, Denmark and Finland, the typical approach is non-directive, in Sweden and Norway there is a mix of both directive and non-directive elements.

In terms of local characteristics of coaching, there is, for example, a very good balance between company interests and personal coachee interests in Denmark. Similarly, it is crucial to understand that in Sweden, the business culture is built on old traditions between trade unions and employer associations, leading to good working habits and a sense of security for the people. This has impact on coaching in various ways. International influences are increasingly starting to now change the traditional style though.

Also, interaction is generally less hierarchical and uses more dialogue and discussion in Finland, for example. This clearly shapes the way coaching is delivered. Finally, it is important to know that Norwegians like to do things in their own way and like coaching skills to be Norwegian, so foreign coaches may find it difficult to enter the market.

e. East Europe (former communist countries)

After the fall of the wall, coaching slowly also started to reach the former communist countries more and more. On the one hand this later opening was a disadvantage, as these countries had no experience in coaching for a long time and would need time to catch up. On the other hand, this was an opportunity, as there was no past track record of any made mistakes about coaching. And so they could go right to current best practice and pick out what would best meet their needs.

Now, while coaching has made continuous progress in East Europe, the figures today clearly suggest that it is still generally less advanced than coaching in Western Europe. In none of the examined countries (Poland, Czech Republic, Slovakia, Hungary, Romania, Bulgaria, Lithuania, Estonia, Latvia, Slovenia, Croatia, Macedonia, Russia and Ukraine), is coaching today widely accepted and used as a business tool. And only about 3-4 % (500-700 coaches) of the about 17.000 currently operating EU business coaches are from the former communist EU countries (though these accommodate around 20% of the EU inhabitants).

However, coaching is progressing steadily and is on a good way - particularly in the Czech Republic, Slovakia and Lithuania. In these three countries, coaching is in the growth phase already, fairly accepted and used as a business tool, and quite advanced in becoming a real profession (only for Poland the last point also applies). What is more, two recent international coaching conferences took place in Slovakia in 2006 (SAKO, 2006) and in the Czech Republic in 2007 (CAKO, 2007). Both conferences were of high quality and cutting-edge in terms of content (e.g. discussion of the coaching culture concept in theory and practice).

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Apart from these exceptions, coaching still has a long way to go to become a real profession in Eastern Europe. Coaching in Bulgaria, Hungary, Poland, Romania, Slovenia, Croatia and Ukraine is still in the introduction phase. And it hasn't yet even left the development phase in Estonia, Latvia, Macedonia and Russia.

It can be observed that the coaching industry in East Europe is facing very similar issues and challenges today that many Western European countries started to encounter when they began to introduce coaching in the past:

- Lack of understanding on what coaching is, what are its benefits and what is required to become a professional coach
- No clear distinction between coaching, consulting, training and therapy
- A high need for more information and education on coaching in the public
- Lack of professional coaching standards and coaching bodies
- Lack of professional coaching trainings
- Difficulty to start and get clients in a coaching market that still needs to be created
- Overcoming cultural barriers and existing misconceptions on coaching
- Incorrect usage of the word coaching
- etc.

Beyond these general points, the following, more region-specific aspects (mentioned by participants in their survey answers) may also be important and help partly explain the current coaching situation:

- The heritage of the communist era may sometimes make it more difficult to promote and sell coaching successfully (you may find a lower significance and perceived value of individual learning and development measures in general and thus also of coaching; a differentiated range of services and service providers may not exist yet; there may be a general reluctance to buy and pay for such services).
- Western multinational companies are often an important, if not the only driver for the emergence and development of coaching in a number of former communist countries.
- Domestic managers may have experienced the Western influence not only in a positive way. So there may partly be reservations about the West leading to reservations about coaching - as a service originally coming from the west - and Western coaches here and there.

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f. Other countries (Ireland, Austria, Switzerland)

Ireland

Ireland seems to have the highest density of coaches in the EU besides the UK (500 coaches = 1 business coach / 8000 inhabitants). Coaching is widely accepted and used as a business tool, and it is still continuing to grow. Besides professional coaching associations, an Irish Coach Development Network has also been founded that supports the co-development of an independent, national framework for the development and accreditation of coaches.

Interestingly, the prevailing coaching approach in Ireland is fairly directive and supervision doesn't play a major role. There is a clear preference towards face-to-face coaching (versus coaching by phone), and you find only few full-time coaches.

Austria and Switzerland

Austria and Switzerland have some parallels to Germany as part of the German-speaking area. However, there are also many differences between these two countries: Coaching is widely accepted and used as a business tool in Switzerland, in Austria this doesn't apply (yet). Coaching is far advanced on its way to becoming a real profession in Switzerland, in Austria it is not. There are coaching bodies in both countries, but the Austrian ones are rarely known in their country. Coaching in Switzerland is growing, whereas in Austria it is just coming from introduction and increasingly starting to enter the growth phase now. In Switzerland there are about 300-500 coaches opposed to just 50 in Austria. Swiss coaches widely use supervision, Austrian coaches don't.

As a side note: to be taken seriously as a coach in Switzerland, it is important to be able to show an official recognition such as a diploma. What is more, in Austria many coaches – for legal (chamber regimentation) reasons only - feel forced to put on the hat of a consultant.

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3. Closing note

In fact, there is no consistent picture of coaching in Europe yet: Whereas the Anglo region, the founder countries of the European-Community as well as Scandinavia may be regarded as having an overall well developed coaching-industry, this is less true for the Mediterranean region - and even less the case for the former communist area. And within each of these regions in turn, the practice and stages of development of coaching may differ enormously depending on each country.

At the same time, the overall trend is clear: coaching is on the rise in all of Europe. The coaching developments are in a steady flux, and it will be interesting to see how these processes will develop further in the next years. Therefore, it is planned to undertake the European Coaching Survey regularly from now on to be able to also examine and show the development of coaching in Europe in the long run.

There is still a lot of research on coaching in Europe to be done, and this survey may hopefully also serve as an invitation and starting point for others to undertake further and other research in the field.

As a final note, it is worth repeating that a number of answers given by the participating organisations in the survey could only be rough estimates, as there are no formal statistics about coaching in hardly any European country yet. So the results do give a good, first idea of coaching in Europe as a whole and in each European country and region. But it is clear they are far from being absolute and impeccable.

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C. List of Participants

We thank the following organisations and persons for their readiness, time and effort to support and participate in the European Coaching Survey 2007/8:

In the 27 EU Member States:

1. Austria: ICF Austria (Dr. Klara Kotai-Szarka, Board Member)
2. Belgium: European Coaching Association (Belgium) (Nathalie Alsteen, President)
3. Bulgaria: MLC International Consulting Group (Magdalena Nikolova)
4. Cyprus: Dr. Sotiris Jeropoulos (Associate Professor, Frederick University)
5. Czech Republic: Czech Association for Coaching (CAKO) (Rosta Benak, Leon-Libor Lacina, Jan Hruska, Lenka Seibertova, Vladimir J. Dvorak, Milan Klindera, Petr Kallista)
6. Denmark: The Coaching Company (Jesper Elling, President)
7. Estonia: Marco Rillo (Chair of Organization and Management, Tallinn University of Technology)
8. Finland: ICF Finland (Kaj Hellbom, Director)
9. France: Société Française de Coaching (SFC) (Pascale Reinhardt, Vice President)
10. Germany: Deutscher Bundesverband Coaching (DBVC) (Geschäftsstelle)
11. Greece: Theresia Remoundos (Business & Life Coach)
12. Hungary: KEY Consulting (Terezia Koczka, Managing Director)
13. Ireland: Association for Coaching (AC) in Ireland (Krishna De, Founder and Vice Chair)
14. Italy: Federazione Italiana Coach (ICF Italy) (Silvia Tassarotti, President)
15. Latvia: Organisation Development Centre “Spring Valley” (Ilze Skuja)
16. Lithuania: JSC “Baltic Coaching Centre” (Oleg Kovrikov, President)
17. Luxembourg: European Coaching Association of Luxemburg (AECL/ECA Luxembourg, recently EMCC Luxembourg) (Marie-Brigitte Bissen, President)
18. Malta: WorkAssist (Patrick J. Psaila, Director)
19. Netherlands: ICF Netherlands (Edmée Schalkx, Founder and President)
20. Poland: ICF Poland (Francois Nail, President)
21. Portugal: Asociacion Iberoamericana de Coaching (AIAC) (Joao A. Catalao, President)
22. Romania: ICF Romania (Serban Chinole, Chapter Leader)
23. Slovakia: Slovak Association of Coaches (SAKO) (Klara Giertlová and Zlatica M. Stubbs)
24. Slovenia: Institut for Coaching (Franci Cec, Director)
25. Spain: ICF Spain (Viviane Launer, President)
26. Sweden: ICF Nordic Sweden (Mats Ogren, Board Director)
27. United Kingdom: Association for Coaching (AC) (Alex Szabo, Vice Chair)

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The 3 EU Candidate Countries

- 28. Croatia: Adrijana Strnad, Corporate Coaching
- 29. Former Yugoslav Republic of Macedonia: Clear View – BTC (Jelena Stamenkova)
- 30. Turkey: ICF Turkey (Dilek Yildirim Akgun, President)

5 Non-EU Members

- 31. Iceland: Leiotogi ehf (Bergsteinn Isleifsson, CEO)
- 32. Norway: ICF Nordic Norway (Anne Kari Vindenes, President 2008)
- 33. Russia: ICF Russia, International Coaching Academy (Svetlana Chumakova, President)
- 34. Switzerland: Swiss Coaching Association (SCA) (Peter Nilitschka, Board Member)
- 35. Ukraine: Successful Communities Institute (Larissa Shidlovskaya)

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D. Bresser Consulting

Bresser Consulting – Creating Coaching Cultures is a global provider of coaching and coaching culture services.

Its international, leading-edge research projects, e.g. in the field of implementation and improvement of coaching in organisations (Coaching Research Project 2005; Transatlantic Coaching Pilot Project), have won worldwide acclaim.

Bresser Consulting is headquartered in Cologne (Germany), and is working together with leading companies worldwide.

www.bresser-consulting.com

Head Office

Tel. +49 (0)2 21 - 5 70 86 42
info@bresser-consulting.com

Ehrenfeldguertel 151
50823 Cologne
Germany

Project Head:
Frank Bresser, Head of Bresser Consulting
frankbresser@bresser-consulting.com

This report can be downloaded at:

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