



Frank Bresser Consulting Report

Global Coaching Survey

2008/2009

The state of coaching across the globe:

Results of the Global Coaching Survey 2008/2009

August 2009

FULL REPORT

*Frank Bresser Consulting received Global HR Excellence Award 2011
and Global Coaching Leadership Award 2013*

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HOW TO BEST APPROACH THIS REPORT

QUICK OVERVIEW

If you want to get a quick overview on the state of coaching across the globe, just read the Executive Summary at the beginning.

DETAILED READING

If you want to read the whole report, we suggest you skip the Executive Summary to avoid repetition of reading and read it at the end as a summary instead.

SPECIFIC READING

If you want to look up specific data or other particular information in the report, first have a look at the short and detailed table of contents. The straightforward structure of the report facilitates easy reading and information finding.

To give an example: All continent chapters are structured in exactly the same way: After giving an overview of key facts and figures, the main themes are addressed in more detail and illustrated by graphs and tables. Finally, the situation of coaching in the different regions of the continent is set out.

DO NOT SKIP THE SECTION ON RESEARCH DESIGN

Whatever use of the results you make, do not skip the information on the research design (be it in the Executive Summary or in the main text). It enables you to assess the validity of the results properly.

SHORT TABLE OF CONTENTS

<i>How to best approach this report</i>	2
<i>Executive Summary</i>	4
<i>Detailed Table of Contents</i>	14
I. The Project	18
A. Purpose	18
B. Research design	18
C. The 162 covered countries	20
D. Further remarks	23
E. Report editions	24
F. Frank Bresser Consulting	24
II. The Results	25
A. World overall	26
B. Situation in each continent	40
1. Africa	41
2. Asia	60
3. Australasia/Oceania	85
4. Europe	97
5. North America	128
6. South America	146
III. List of participating organisations/people	164
IV. Closing note	167
V. Report editions	168
VI. About Frank Bresser Consulting	170

REPORT: *Executive Summary*

This summary gives an overview of the situation of coaching across the globe by presenting the key results of the Frank Bresser Consulting Global Coaching Survey 2008/2009. The project covered 162 countries and, for the first time, systematically examined the situation and development of coaching in the world overall, in each continent, region and country. The first part sets out the research purpose and design. Then, a summary of the most important results regarding the world overall and each continent (in alphabetical order) follows. The Executive Summary finishes with a closing note and information on where to get this report.

The Project

PURPOSE

The Global Coaching Survey 2008/2009 examined the current state and development of coaching in the world overall, in each continent, region and country. Frank Bresser Consulting conducted research in 162 countries (which account for almost 100% world population).

RESEARCH DESIGN

The research topic and the general lack of statistics on coaching (and of valid quantitative samples across the globe) supported a qualitative - rather than quantitative - approach: The research team identified qualified organisations and people, who have a good overview of coaching in their country and the resources to gather further relevant information as needed, as the main sources of data.

Participant selection and data generation

Identifying participants:

First, we identified the existing national and international coaching associations around the world, as it is their remit to gather relevant information on their local coaching markets. The second step was to identify a leading one in each

country and invite these to respond to our questionnaire. Where we couldn't identify a coaching association in a country, we searched for a suitable, leading coaching-related association (e.g. Human Resources), coaching provider, consultancy, coaching expert or coaching-related university faculty with credibility in providing relevant information.

Questionnaire design:

The questionnaire included open and closed questions. Partly, questions were similar to each other to allow for cross-checking within the answers given by a participant. The questions generally allowed for interpretation by the participants in order to embrace maximum diversity of coaching practices and approaches, rather than putting participants in a pre-set box that might not fit. We were eager to listen and learn, not prescribe or promote a certain way of doing things.

Accordingly, we deliberately kept the questions broad and did not define terms precisely or assume a specific understanding of coaching. How questions were interpreted and answered provided insights into the understanding, practice and development of coaching in each country.

Participant responses:

It was the responsibility of each participating organisation to decide on the most appropriate approach/resources to gather the required information. This ranged from local surveys and board-meetings to market researches/analyses to the use of existing statistics. In fact, this survey actually triggered many local research initiatives on coaching across the globe.

However, it is important to highlight that in many cases responses are rough estimates. Coaching is a young discipline, and exact figures are rarely available (e.g. as most countries have no requirement to register as a coach, it is difficult to identify their number of coaches). So whilst the survey can provide a good first idea of coaching around the world, in each continent, region and country, it is far from being absolutely accurate. Where the results open up controversial discussions, this is welcome and in the spirit of the survey.

Validation and comparability:

After receiving participants' information, we reviewed this data and checked it for internal and external consistency, relevance, clarity and validity. As appropriate, we made further enquiries of participants to gather further information and clarification. This stage of dialogue and discussion was a very valuable part of the whole process producing further highly interesting insights and giving much more background information. Another final review and editing stage followed, and only then did we take the answers as accepted country information.

Only at this stage, did we work towards making sense of the data and align them for optimal consistency and comparability (inductive approach). The point is: in order to avoid comparing apples with oranges, you first need to know what kind of fruits there are and be able to recognize them.

Setting the foundation:

The Global Coaching Survey will be conducted regularly from now on and is definitely an ongoing project. The Global Coaching Survey 2008/2009 has now set the right foundation. In the next run, we will be able to build on and compare with these findings.

In this first run of the survey, there is a focus on professional one-to-one business coaching. This was deliberately chosen as it is the most visible and well-known coaching form so far in the corporate world and thus was a valid starting point. However, it is only the starting point. Next time, there will be much more coverage of other coaching forms (e.g. coaching leadership style, coaching culture, team coaching).

Additionally researched countries

It was our initial ambition to find suitable participants in every country, and we actually identified qualified participants in most countries (covering 88% of the world population). All countries with a visible coaching industry have participated. However, research was very difficult in a number of countries where coaching wasn't yet developed. Here, we were successful in a great number of cases, but not all.

With regard to these latter cases, where the following possible research activities found nothing tangible, we decided to stop and share our own findings on the basis of these activities instead:

Available in the Book Trade:



THE GLOBAL BUSINESS GUIDE for the successful use of COACHING IN ORGANISATIONS

2013 Edition

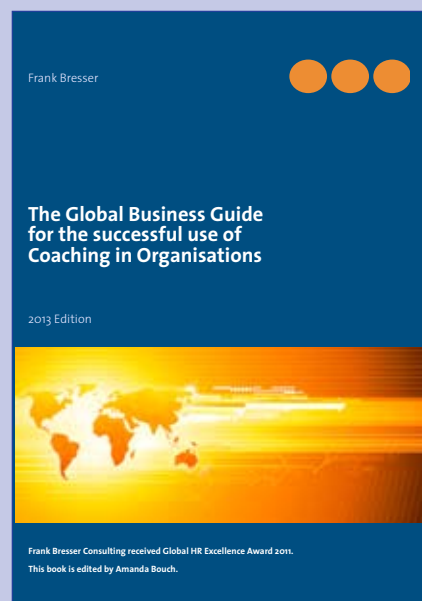
by Frank Bresser



ISBN 978-3-8482-5378-4

Including...

- The 7 leading-edge Frank Bresser Consulting frameworks for the successful implementation and improvement of coaching in business
- 23 Case studies from all over the world



- Extensive online research on coaching in the country
- Conversations with people in the country
- Conversations with participants from neighbour countries
- Researching memberships of people/organisations from the country in international coaching associations (or related associations)
- Contacting local institutions for further information, e.g. Chambers of Commerce, international representations in countries, UNDP (United Nations Development Programme, the UN's global development network)
- Making use of other networks

We acknowledge that it remains possible that there are coaching providers and communities in these countries we haven't yet discovered. This may be especially true, where organisations/people don't have internet access, are very locally organized and/or are operating and presenting themselves in a rarely known language.

However, we have assumed that if there was a strong, growing coaching industry in the country, we would have been able to discover it in the given time. As a result we can only give a very rough estimate/impression of the lack of coaching in these countries.

It remains our aim to get participants from all countries in future runs of the survey. In fact, the survey is work in progress, and we are happy to include anyone knowledgeable about coaching in these countries in the future.

Further remarks

It is the first time that coaching associations from all over the world were identified, contacted and successfully brought together in a big project like this. The list of participating organisations and people alone is worth reading.

Remarkably, just two of all participants mentioned the financial crisis in their answers - and this only marginally. Therefore, when the answers were generated (2008 and early 2009), the financial crisis hadn't already hit the coaching market in a significant way. This makes the Global Coaching Survey 2008/2009 particularly important and valuable: It is not just the snapshot of very exceptional circumstances. It reflects and documents the state and (longer term) development of coaching right up to the point before any potential volatility in the coaching market due to the global crisis occurred.

The Results

We will first look at the situation of coaching in the world overall and then go into detail for each continent (in alphabetical order).

Frank Bresser Consulting



Frank Bresser, M.B.A.

Mobile +49 (0)1 79 - 4 33 88 76
Email: frankbresser@bresser-consulting.com

Frank Bresser Consulting Office:

Tel. +49 (0)2 21 - 5 70 86 42
Email: info@bresser-consulting.com
Fax +49 (0)2 21 - 5 70 86 43

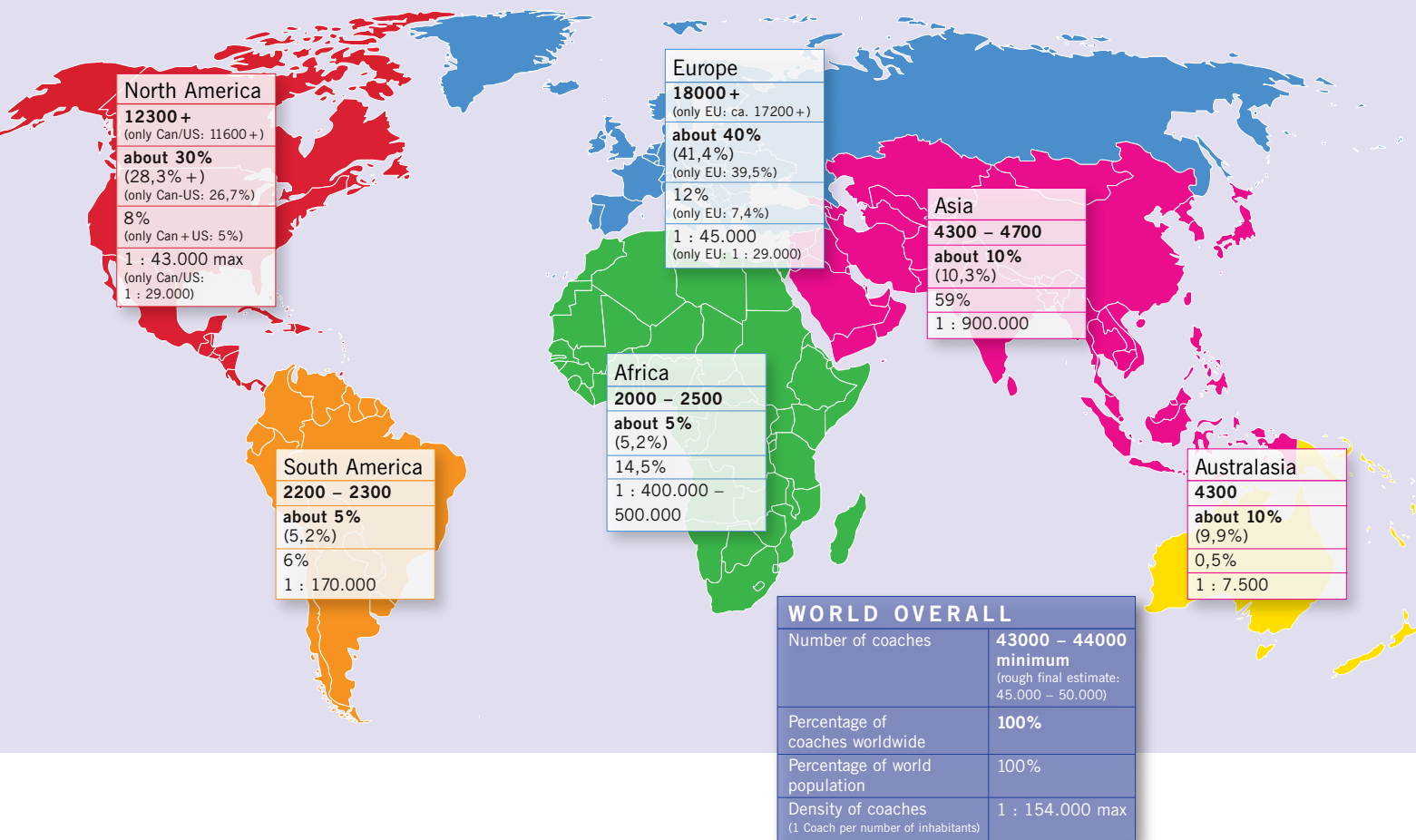
Postal address:
Fridolinstr. 13, 50823 Cologne, Germany

www.frank-bresser-consulting.com

Frank Bresser is the global business expert for the successful implementation and improvement of coaching.

Supported by his worldwide team of assistant consultants, he advises companies on the effective use of coaching.

His expertise is used and put in practice successfully in organisations across the globe and has set international standards in the implementation and improvement of coaching.



WORLD OVERALL

There are about 43,000-44,000 business coaches minimum operating in the world.

Coaching is definitely a global phenomenon; the top 10 countries with the highest numbers of coaches include an Asian, an African and a South American country (Japan, South Africa, Brazil). However, there remain extreme differences in the development and size of coaching markets depending on each continent and country.

Europe, North America and Australia – representing just 20% of the world population - comprise 80% of all business coaches of the world. More than two thirds of all coaches are based in the European Union, USA and Canada which represent just 13% of the world population.

Specifically: The 7 countries with the highest numbers of coaches (US, UK, Germany, Australia, Japan, Canada, South Africa) comprise only 10% of the world population, but about 73% of all coaches.

Coaching is on the rise across the globe and there are singular, highly developed and dynamic “centres” of coaching. But comprehensive area-wide coverage of coaching is far from a reality. This is true for all continents.

This can be further illustrated by the following findings:

- Coaching is already widely accepted and used as a business tool in 28 countries (of these 14 are European). However, in 114 countries (about 70% of all countries), it is not. In another 20 countries, this is undecided.
- In 33 countries, coaching is in the growth phase (7 of these in early stages of growth). In a further 50 countries coaching has entered the introduction phase (5 of these being in between pre-introduction and introduction). In the remaining 77 countries (nearly 50%), business coaching hasn't yet visibly developed. In two countries (Norway and the Netherlands), coaching has already entered the maturity phase.
- In 27 countries from all continents, business coaching is well advanced towards becoming a profession (15 from Europe). However, in 125 countries, i.e. in nearly four fifths of all countries, it is not. In 10 countries, this is undecided.
- National and international coaching associations exist in Northern America, Europe, and Australasia. There are also some in South America, but few in Asia and even less in Africa. In nearly half of the 162 countries, there is no single member of any national or international coaching body in the country.

- The concept of coaching cultures is quite well known in 19 countries. In a further 29 countries there is slight knowledge and use of it. However, in 111 countries, the concept is hardly or not known at all.
- There is an overall balance of directive and non-directive coaching approaches in the world. The predominant coaching style is directive in 28 countries, non-directive in 24 countries. In 110 countries, this is undecided.
- The use of coach supervision is widely spread in 23 countries (around 15% of all countries).

Generally speaking, there is no dominant picture of coaching yet and diversity prevails. There is not the African, Asian, Australasian, European, North American or South American approach. But you need to look into each continent to find out more.

New Book Publication:



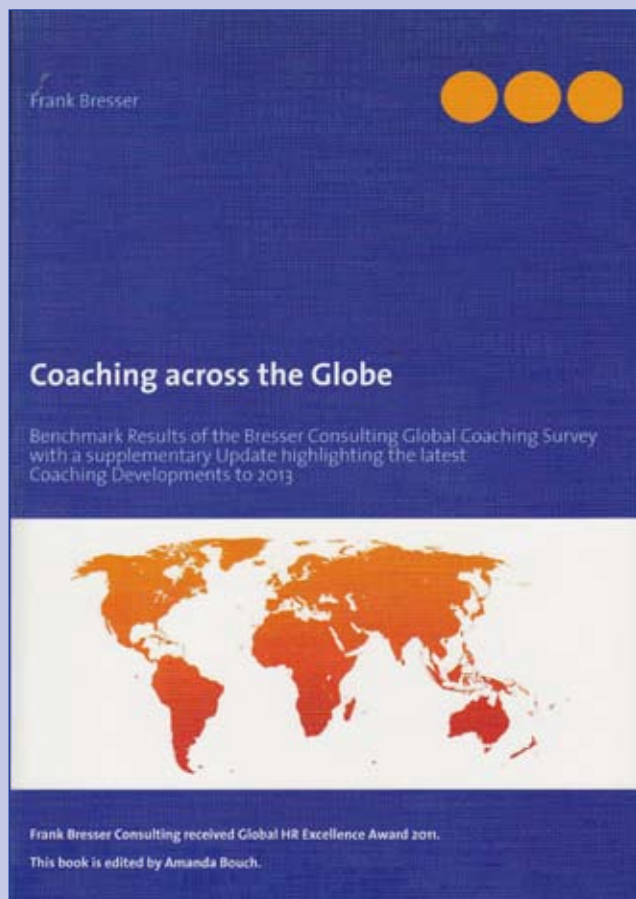
COACHING ACROSS THE GLOBE

Benchmark results of the Bresser Consulting Global Coaching Survey with a supplementary update highlighting the latest coaching developments to 2013



Feb 2013

Available as paperback and e-book in the international book trade now!



by Frank Bresser

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AFRICA

There are about 2,000-2,500 business coaches operating in Africa.

South Africa – with about 5% of the African population – has around 1600 business coaches comprising about 70% of the total. Approximately 12% of African coaches (260) are based in Egypt, Kenya and Morocco, so the other 44 African countries have the remaining 18% of business coaches on the continent.

The density of coaches in Africa is 1 coach per 400,000-500,000 inhabitants (without South Africa it would be 1 coach per 1-2.3 million inhabitants).

In Africa, coaching is still in its infancy. The following findings illustrate this further:

- Only in Morocco is coaching already widely accepted and used as a business tool. In three other countries (South Africa, Egypt, Libya,) this is undecided.
- In two countries (Morocco and South Africa) coaching is already in the growth phase, and in another 9 countries it is in the introduction phase. In the remaining 36 countries, however, business coaching hasn't yet visibly developed.
- In Morocco and South Africa, one-to-one business coaching is already well advanced towards becoming a profession. In all other 46 countries, it is not. No country is undecided.
- National coaching associations have successfully developed in Morocco and South Africa. Emerging coaching communities may also be found in Uganda and Nigeria. However, the overall situation with regard to professional coaching bodies in Africa (national or international ones) is very poor.
- The coaching culture concept is almost unknown in Africa. Only in South Africa, and here above all in the context of multinational companies rather than in local companies, is it mentioned.
- There are few local coaching initiatives in Africa yet (only in Morocco, South Africa and partly in Uganda, Nigeria and Egypt) which define and develop coaching specifically for their country or region. Coaching is more driven and determined by multinational clients and international

coaching, if it exists at all. You rarely find specifically African coaching approaches on the continent at this early stage. General issues are the need for better education of clients and the challenge to overcome existing cultural barriers.

- Geographically speaking there are huge gaps: coaching features in Northern Africa and in South Africa plus Botswana and in Kenya and Uganda in the East and Nigeria and Gabon in the West, but the rest of the continent is still undiscovered in terms of coaching.
- The use of coach supervision is widely spread in 4 countries. Remarkably, these have a rather "small" coaching industry (10-60 business coaches). In contrast, in South Africa with about 1600 coaches, supervision is not widely used.
- There is a strong directive dimension to coaching in Africa. In 6 countries a directive coaching approach prevails and a non-directive approach predominates in no single country. Also, where it is undecided, it is mainly because there is simply no coaching industry yet. In nearly all countries, it is an issue that clients expect to get advice and direction from (potential) coaches.

ASIA

There are about 4,300-4,700 business coaches operating in Asia.

Japan and South Korea – with about 4% of the Asian population – have around 2,500 business coaches comprising about 55% of all Asian coaches. Another 10% of coaches are based in the region of Singapore, Malaysia and the Philippines.

The density of coaches is 1 coach per 900,000 inhabitants in Asia (without Japan it would be 1 coach per 1.4-1.6 million inhabitants).

In general, Eastern and South-eastern Asia may be regarded as the two largest and most dynamic coaching regions. There are major coaching activities in only a few other countries (e.g. United Arab Emirates, Israel, India). Apart from these, however, coaching is still in its infancy (if at all) in Asia.

The following findings illustrate this further:

- In Japan, Malaysia, Singapore and South Korea, coaching is widely accepted and used as a business tool. In 32 countries (about 75%), it is not. In another six countries this is undecided (India, United Arab Emirates, Israel, Philippines, Lebanon, Bahrain).
- In Japan and South Korea, one-to-one business coaching is well advanced towards a profession. In 37 countries, it is not. Only in 3 countries, this is undecided. There is a tendency in Asia to see and develop coaching more as a service rather than as a profession.
- In 5 countries (Japan, Singapore, South Korea, United Arab Emirates and the Philippines) coaching is in the growth phase, in another 17 countries it is in the introduction phase. In the remaining 20 countries, however, business coaching hasn't yet visibly developed - no coaching industry could be identified.
- There is no prevailing coaching style in Asia. However, there is a slight slant towards directive coaching: 13 countries claim directive as the dominant style (in Bangladesh and Pakistan coaching is highly directive), whereas 6 countries claim non-directive coaching as the predominant style. In 23 countries, this is undecided. So there is not the Asian approach. Depending on each country, there are many different local characteristics and preferences in the way coaching is understood and delivered.
- In three countries (Japan, Philippines, Malaysia), the coaching culture concept is already well known and used. In another five countries (China, India, Israel, Saudi-Arabia, United Arab Emirates) this is partially the case.
- International coaching associations are quite active in Asia and contribute to the development of coaching there. At the same time, a number of local coaching initiatives have already emerged in Asia and have started to define and develop coaching specifically for the respective region or country. National or regional coaching bodies partly exist or are starting to emerge and be formalized. Also a first international (i.e. Asia Pacific) coaching association in the region has been set up. So coaching is clearly on the rise and in the process of becoming more mature in Asia in terms of quality and infrastructure.
- However, coaching is still mainly driven and determined by multinational clients or international coaching. As a result,

you rarely find specific Asian coaching forms and approaches. So while local initiatives increasingly take place in Asia, these still remain rather limited.

AUSTRALASIA

There are about 4,300 business coaches operating in Australasia, of which around 4,000 are based in Australia and 300 in New Zealand (in Papua New Guinea, the estimate is up to 10).

Australasia is the continent with the highest density of coaches (1 coach per 7,500 inhabitants). Although it only represents 0.5 % of the world population, about 10% of all business coaches across the globe are based here.

There is a clear divide between Australia and New Zealand on the one hand, where coaching is in the growth phase, widely accepted and used as a business tool and well advanced towards becoming a profession and Papua New Guinea on the other hand, where it is still in the pre-introduction phase.

Australia has the highest density of coaches in the world (1:5,300); New Zealand has the fifth highest (1:14,300). Accreditation, codes of ethics and professional coaching bodies are highly developed in Australia in particular.

A directive and straight-forward style of coaching is generally preferred and common practice in both countries.

Supervision is not currently widespread in Australasia, however it is increasingly gaining momentum in Australia and New Zealand.

In New Zealand, the coaching culture concept is well known and widely used, in Australia this is also the case, but less strongly.

EUROPE

There are about 18,000 business coaches operating in Europe. It is therefore the continent with the highest number of coaches.

However, this is not evenly distributed; UK and Germany (nearly 20% of the European population) comprise around 70% of all business coaches on the continent. In contrast, only about 5% of all coaches are based in the area of the former communist countries (40% of the population).

The density of coaches in Europe is 1 coach per 45,000 inhabitants (without Germany and UK it would be 1:120,000). The density in the European Union is 1:29,000 (which is the same as the density of coaches in USA plus Canada).

The nature of coaching in Europe is generally characterized by a great diversity of coaching styles, practices and development degrees; probably due to the existing multiplicity of cultures and countries on the continent. Another significant element of coaching in Europe is the high degree of internationalisation and continuous convergence in the field.

Generally speaking, there is a 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 well developed coaching industries. 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 differ enormously.

Coaching may be far advanced in Europe, but there also remains a lot to be done. This is illustrated further by the following findings:

- In 14 countries (all Western/ Northern Europe), coaching is widely accepted and used as a business tool. However, in 22 countries it is not. In 5 countries this question is undecided.
- In 15 countries (mainly Western/Northern Europe), professional one-to-one coaching is far advanced towards becoming a profession. However, in 21 countries it is not. In 5 cases this is undecided.
- In 16 countries, business coaching is already in the growth phase, in another 15 countries it is in the introduction phase. In 2 countries, coaching has already entered the maturity phase. However, in 8 countries, coaching is still in the pre-introduction phase.
- Plenty of national as well as international coaching associations exist across Europe. In some countries there are even several (e.g. Germany: about 20 major ones). So the infrastructure in terms of coaching bodies is well advanced in Europe. However this is less the case in Eastern and Southern Europe.
- There is a slight slant towards non-directive coaching in Europe. While in 4 countries a directive coaching approach prevails (Greece, Ireland, Latvia, Portugal), non-directive coaching predominates in 12 countries. However, in most countries (25), this is undecided.
- The use of coach supervision is widely spread in one fourth of the European countries (10), in 17 it is not. In 14 this is undecided.
- The concept of coaching cultures is quite well known and widely used in 10 countries; in another 10 countries coaching cultures are known. In 21 countries, however, the coaching culture concept is hardly or not known at all.

NORTH AMERICA

There are at least 12,300 business coaches operating in North America.

USA and Canada comprise around 11,600 business coaches, Mexico another 600. So in all Central America and the Caribbean, there are only 100 to 150 business coaches.

USA, accommodating about 10,000 business coaches (minimum), is the country with the highest number of coaches in the world in terms of absolute coach figures. Canada is the 6th (with at least 1,600 coaches).

The density of coaches on the whole continent is 1 coach per 43,000 inhabitants. In Northern America (USA and Canada) it is 1:29,000 (which is the same as the European Union).

There is an extreme North-South divide in the development of coaching within North America. USA and Canada have highly advanced coaching industries, whereas the whole of Central America is in the pre-introduction phase, and in the Caribbean few coaches are operating. Coaching in Mexico is located somewhere in between the two poles.

The following findings illustrate this further:

- In USA, Canada, Mexico and Puerto Rico (which is a country associated with the USA) coaching is widely accepted and used as a business tool. In all the other 12 countries, it is not. No country reports undecided.
- In Canada, USA and Mexico, coaching is in the growth phase. In 10 countries (including also all Central America) it is still in the pre-introduction phase (no coaching industry could be identified). In three other countries (Puerto

Rico, Dominican Republic and partly in Jamaica) coaching has entered the introduction phase.

- In USA, Canada and Puerto Rico coaching is well advanced towards becoming a profession. In all others, it is clearly not, not even in Mexico.
- There are well-developed professional coaching associations in USA and Canada, but coaching bodies are absent in Central America and the Caribbean. Mexico is in between: coaching associations are already emerging, but these haven't yet been able to establish professional standards successfully in the market and take coaching as a profession to the next level in the country.
- The coaching culture concept is well known and used in USA. This is partly true in Canada and Puerto Rico. However, in Mexico, the concept is only slightly used. In the remaining 11 countries, it is not known (at all).
- There is no prevailing coaching style in North America, the whole range from directive to non-directive coaching can be found. Interestingly, coaching in USA and Mexico is mostly non-directive, whereas it is undecided in Canada. Depending on each country, there may be many different local characteristics and preferences in the way coaching is understood and delivered.
- A typical coaching feature in both USA and Canada is a high emphasis on the (self-directed) role of the individual. Additionally a lot of remote coaching (usually by telephone) as opposed to face-to-face coaching is taking place in the north.
- In Central America, while 1:1 coaching is indeed in its infancy, in Honduras and Costa Rica coaching is emerging as a tool of group facilitation (group coaching) in multinational organisations.
- The use of coach supervision is widely spread only in USA, not for example in Canada and Mexico.

SOUTH AMERICA

There are about 2,200-2,300 business coaches operating in South America.

Comparing this with other regions of the world, the number is quite low, in particular given the overall high development of coaching on the continent.

The density of coaches in South America is 1 coach per 170,000 inhabitants. Interestingly, while Brazil is the country with the highest number of business coaches at 1,000, due to its large population its density of coaches is lower (1:195,000) than the continent average. The highest density of coaches on the continent is in Columbia at 1 coach per 88,000 inhabitants.

South America is generally quite advanced in the development of coaching which is illustrated by the following findings:

- In Argentina, Colombia and Peru, coaching is already widely accepted and used as a business tool. In another 6 countries, this is undecided. In 3 (comparatively small) countries coaching is not much used.
- In 5 of the 12 countries - Argentina, Brazil, Colombia, Peru and Chile - coaching is in the growth phase. In another 5 it is in the introduction phase. In 2 countries, business coaching hasn't yet visibly developed.
- In Argentina, Chile and Peru, coaching is well advanced towards a profession. In 7 countries it is not. In two this is undecided.
- A characteristic of coaching in South America is the high number of countries having a national coaching association (e.g. Argentina, Brazil, Chile, Peru). This suggests that coaching bodies are actively shaping the development and understanding of coaching in a more local way. International coaching associations are also present on the continent.
- The South American coaching approach doesn't exist. Depending on each country, there are many different local characteristics and preferences in the way coaching is understood and delivered. Coaching is not predominantly directive on the continent; on the contrary, there is a slight slant towards non-directive coaching.
- Despite coaching being already quite advanced in a number of countries, the number of business coaches is low when compared with developed coaching markets on other continents.
- There are sometimes cultural reservations about coaching (e.g. conservative style, authoritarian attitude, resistance,

expectation of a directive coach) that need to be overcome (e.g. in Uruguay, Ecuador, Brazil, Chile).

- Venezuela is the only country in South America where coach supervision is widely spread. This is mainly due to the fact that key providers of coach training in the country strongly promote it. Apart from this, supervision doesn't play a major role in South America.
- The coaching culture concept is well known and widely used in Argentina. This is slightly true in Brazil, Uruguay, Venezuela, Colombia and Chile, but in the remaining 6 countries, the concept is not known.

CLOSING NOTE

The Global Coaching Survey will be conducted regularly from now on, and it will be very interesting to see how coaching evolves on each continent in the future.

If you want to share your expertise/thoughts on coaching in a specific continent, region or country, please do so and send an email to: info@bresser-consulting.com

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

REPORT EDITIONS

The Executive Summary and the detailed report on the results of the Global Coaching Survey 2008/2009 (as well as the special editions for each continent) are available for free as download at:

www.frank-bresser-consulting.com/globalcoachingsurvey.html

Full Report:

"The state of coaching across the globe - The results of the Global Coaching Survey 2008/2009"

(Frank Bresser Consulting Report, pdf-file, about 170 pages, August 2009)

Special report editions for each continent:

- Special edition Africa (African Coaching Survey 2008/2009)
- Special edition Asia (Asian Coaching Survey 2008/2009)
- Special edition Australasia (Australasian Coaching Survey 2008/2009)
- Special edition Europe (European Coaching Survey 2008/2009)
- Special edition North America (North American Coaching Survey 2008/2009)
- Special edition South America (South American Coaching Survey 2008/2009)
- Special edition World overall and comparison of continents

All editions are available for free as download at:

www.frank-bresser-consulting.com/globalcoachingsurvey.html

ABOUT FRANK BRESSER CONSULTING

The research project was initiated and conducted by Frank Bresser Consulting.

Frank Bresser is the global business expert for the successful implementation and improvement of coaching. Supported by his worldwide team of assistant consultants, he advises companies on the effective use of coaching. His expertise is used and put in practice successfully in organisations across the globe and has set international standards in the implementation and improvement of coaching.

More information at:

www.frank-bresser-consulting.com

Frank Bresser, M.B.A.

Mobile +49 (0)1 79 - 4 33 88 76

Email: frankbresser@bresser-consulting.com

Frank Bresser Consulting Office:

Tel. +49 (0)2 21 - 5 70 86 42

Email: info@bresser-consulting.com

Fax +49 (0)2 21 - 5 70 86 43

Postal address:

Fridolinstr. 13, 50823 Cologne, Germany

www.frank-bresser-consulting.com

DETAILED TABLE OF CONTENTS

<i>How to best approach this report</i>	2
<i>Short Table of Contents</i>	3
<i>Executive Summary</i>	4
<i>Detailed Table of Contents</i>	14
I. The Project	18
A. Purpose	18
B. Research design	18
C. The 162 covered countries	20
D. Further remarks	23
E. Report editions	24
F. Frank Bresser Consulting	24
II. The Results	25
A. WORLD OVERALL	26
1. OVERVIEW	28
2. MAIN THEMES	29
a. Acceptance and use of coaching	30
b. Number of professional business coaches	31
c. Phase of coaching in its product life cycle	33
d. Directive/non-directive coaching approach	34
e. Regional characteristics of coaching	35
f. Use of supervision by coaches	36
g. Coaching on its way to becoming a real profession	37
h. Spread and use of the concept of “coaching cultures”	39
B. SITUATION IN EACH CONTINENT	40
1. AFRICA	41
1.1 OVERVIEW	43

1.2	MAIN THEMES	44
a.	Acceptance and use of coaching	45
b.	Number of professional business coaches	46
c.	Phase of coaching in its product life cycle	48
d.	Directive/non-directive coaching approach	49
e.	Local characteristics of coaching	50
f.	Use of supervision by coaches	53
g.	Coaching on its way to becoming a real profession	54
h.	Spread and use of the concept of “coaching cultures”	58
1.3	GEOGRAPHICAL AREAS WITHIN AFRICA	59
a.	Northern Africa	59
b.	Southern Africa	59
c.	Western, Middle and Eastern Africa	59
2. ASIA		60
2.1	OVERVIEW	62
2.2	MAIN THEMES	63
a.	Acceptance and use of coaching	64
b.	Number of professional business coaches	65
c.	Phase of coaching in its product life cycle	67
d.	Directive/non-directive coaching approach	68
e.	Local characteristics of coaching	69
f.	Use of supervision by coaches	75
g.	Coaching on its way to becoming a real profession	76
h.	Spread and use of the concept of “coaching cultures”	81
2.3	GEOGRAPHICAL AREAS WITHIN ASIA	82
a.	Eastern Asia	82
b.	Southeastern Asia	82
c.	Southern Asia	83
d.	Western Asia	83
e.	Central Asia	83
3. AUSTRALASIA/OCEANIA		85
3.1	OVERVIEW	87
3.2	MAIN THEMES	87
a.	Acceptance and use of coaching	88
b.	Number of professional business coaches	89
c.	Phase of coaching in its product life cycle	90
d.	Directive/non-directive coaching approach	91
e.	Local characteristics of coaching	92
f.	Use of supervision by coaches	93
g.	Coaching on its way to becoming a real profession	94
h.	Spread and use of the concept of “coaching cultures”	96

4. EUROPE	97
4.1 OVERVIEW	99
4.2 MAIN THEMES	100
a. Acceptance and use of coaching	101
b. Number of professional business coaches	102
c. Phase of coaching in its product life cycle	104
d. Directive/non-directive coaching approach	106
e. Local characteristics of coaching	107
f. Use of supervision by coaches	114
g. Coaching on its way to becoming a real profession	115
h. Spread and use of the concept of “coaching cultures”	121
4.3 GEOGRAPHICAL AREAS WITHIN EUROPE	123
a. Comparison: UK and Germany	123
b. Founder countries of the European Community (France, Italy, Netherlands, Belgium, Luxembourg, incl. Germany)	123
c. Mediterranean countries (Spain, Portugal, Greece, Malta, Cyprus, Turkey)	124
d. Scandinavia (Denmark, Sweden, Norway, Finland, Iceland)	124
e. East Europe (former communist countries)	124
f. Other countries (Ireland, Austria, Switzerland)	126
g. Special: The European Union	126
5. NORTH AMERICA	128
5.1 OVERVIEW	130
5.2 MAIN THEMES	131
a. Acceptance and use of coaching	132
b. Number of professional business coaches	133
c. Phase of coaching in its product life cycle	135
d. Directive/non-directive coaching approach	136
e. Local characteristics of coaching	137
f. Use of supervision by coaches	139
g. Coaching on its way to becoming a real profession	140
h. Spread and use of the concept of “coaching cultures”	143
5.3 GEOGRAPHICAL AREAS WITHIN NORTH AMERICA	144
a. Northern America	144
c. Central America	144
b. Bridge in between: Mexico	144
d. Caribbean	144
6. SOUTH AMERICA	146
6.1 OVERVIEW	148
6.2 MAIN THEMES	149

a.	Acceptance and use of coaching	150
b.	Number of professional business coaches	151
c.	Phase of coaching in its product life cycle	153
d.	Directive/non-directive coaching approach	154
e.	Local characteristics of coaching	155
f.	Use of supervision by coaches	157
g.	Coaching on its way to becoming a real profession	158
h.	Spread and use of the concept of “coaching cultures”	161
6.3	GEOGRAPHICAL AREAS WITHIN SOUTH AMERICA	162
a.	La Plata countries	162
b.	Brazil	162
c.	Andean countries	162
d.	Countries at the Caribbean Sea	162
III. List of participating organisations/people		164
IV. Closing note		167
V. Report editions		168
VI. About Frank Bresser Consulting		170

REPORT

The first part of this report sets out the research purpose and design. Then, the presentation of the results regarding the world overall and each continent (in alphabetical order) follows. The report finishes with the list of participating organisations/people, a closing note and information on Frank Bresser Consulting and the available report editions.

I. THE PROJECT

A. PURPOSE

The Global Coaching Survey 2008/2009 examined the current state and development of coaching in the world overall, in each continent, region and country. Frank Bresser Consulting conducted research in 162 countries (which account for almost 100% world population).

B. RESEARCH DESIGN

The research topic and the general lack of statistics on coaching (and of valid quantitative samples across the globe) supported a qualitative - rather than quantitative - approach: The research team identified qualified organisations and people, who have a good overview of coaching in their country and the resources to gather further relevant information as needed, as the main sources of data.

Participant selection and data generation

Identifying participants:

First, we identified the existing national and international coaching associations around the world, as it is their remit to gather relevant information on their local coaching markets. The second step was to identify a leading one in each

country and invite these to respond to our questionnaire. Where we couldn't identify a coaching association in a country, we searched for a suitable, leading coaching-related association (e.g. Human Resources), coaching provider, consultancy, coaching expert or coaching-related university faculty with credibility in providing relevant information.

Questionnaire design:

The questionnaire included open and closed questions. Partly, questions were similar to each other to allow for cross-checking within the answers given by a participant. The questions generally allowed for interpretation by the participants in order to embrace maximum diversity of coaching practices and approaches, rather than putting participants in a pre-set box that might not fit. We were eager to listen and learn, not prescribe or promote a certain way of doing things.

Accordingly, we deliberately kept the questions broad and did not define terms precisely or assume a specific understanding of coaching. How questions were interpreted and answered provided insights into the understanding, practice and development of coaching in each country.

Participant responses:

It was the responsibility of each participating organisation to decide on the most appropriate approach/resources to gather the required information. This ranged from local surveys and

board-meetings to market researches/analyses to the use of existing statistics. In fact, this survey actually triggered many local research initiatives on coaching across the globe.

However, it is important to highlight that in many cases responses are rough estimates. Coaching is a young discipline, and exact figures are rarely available (e.g. as most countries have no requirement to register as a coach, it is difficult to identify their number of coaches). So whilst the survey can provide a good first idea of coaching around the world, in each continent, region and country, it is far from being absolutely accurate. Where the results open up controversial discussions, this is welcome and in the spirit of the survey.

Validation and comparability:

After receiving participants' information, we reviewed this data and checked it for internal and external consistency, relevance, clarity and validity. As appropriate, we made further enquiries of participants to gather further information and clarification. This stage of dialogue and discussion was a very valuable part of the whole process producing further highly interesting insights and giving much more background information. Another final review and editing stage followed, and only then did we take the answers as accepted country information.

Only at this stage, did we work towards making sense of the data and align them for optimal consistency and comparability (inductive approach). The point is: in order to avoid comparing apples with oranges, you first need to know what kind of fruits there are and be able to recognize them.

Setting the foundation:

The Global Coaching Survey will be conducted regularly from now on and is definitely an ongoing project. The Global Coaching Survey 2008/2009 has now set the right foundation. In the next run, we will be able to build on and compare with these findings.

In this first run of the survey, there is a focus on professional one-to-one business coaching. This was deliberately chosen as it is the most visible and well-known coaching form so far in the corporate world and thus was a valid starting point. However, it is only the starting point. Next time, there will be much more coverage of other coaching forms (e.g. coaching leadership style, coaching culture, team coaching).

Additionally researched countries

It was our initial ambition to find suitable participants in every country, and we actually identified qualified participants in most countries (covering 88% of the world population). All countries with a visible coaching industry have participated. However, research was very difficult in a number of countries where coaching wasn't yet developed. Here, we were successful in a great number of cases, but not all.

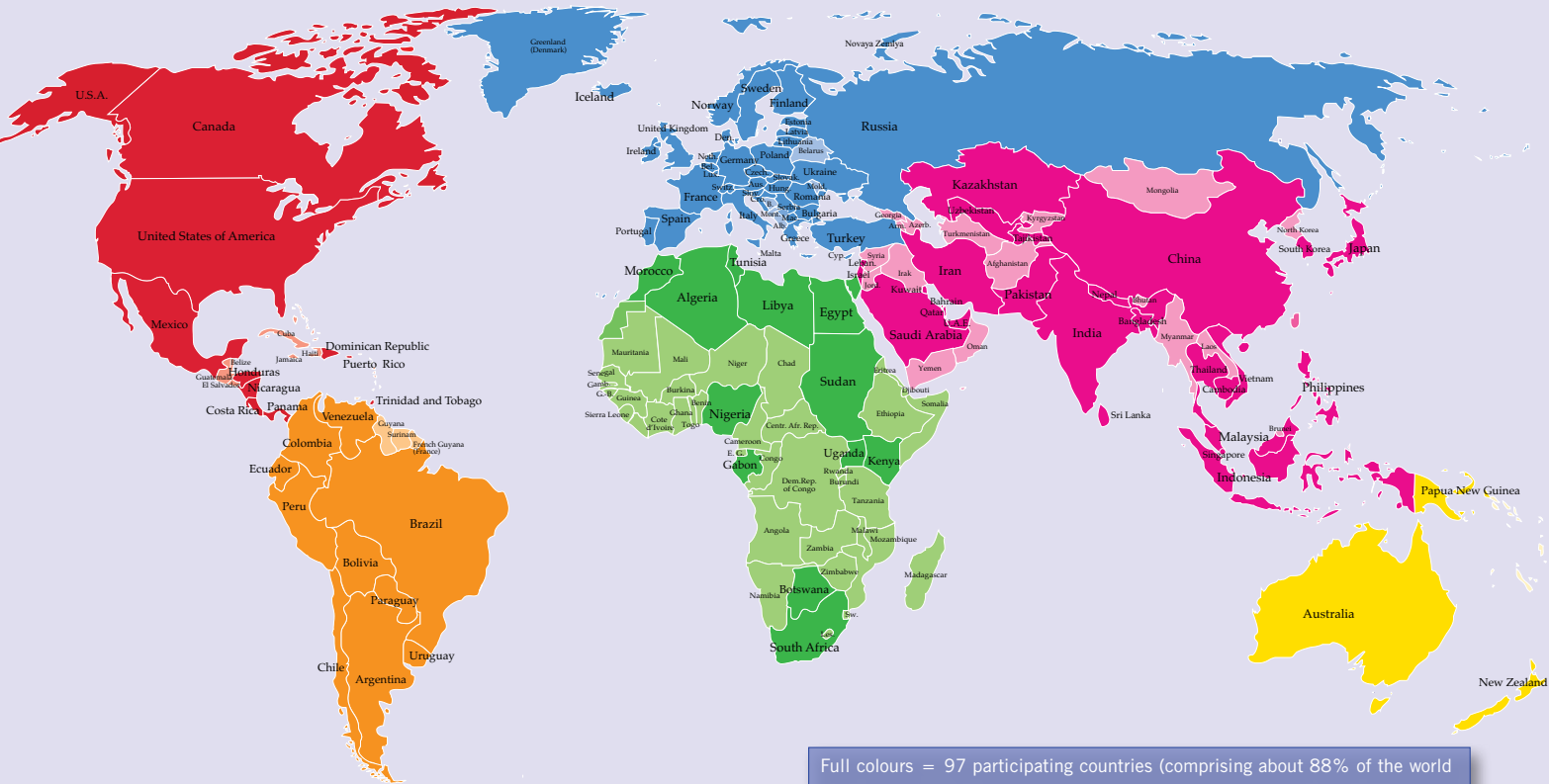
With regard to these latter cases, where the following possible research activities found nothing tangible, we decided to stop and share our own findings on the basis of these activities instead:

- Extensive online research on coaching in the country
- Conversations with people in the country
- Conversations with participants from neighbour countries
- Researching memberships of people/organisations from the country in international coaching associations (or related associations)
- Contacting local institutions for further information, e.g. Chambers of Commerce, international representations in countries, UNDP (United Nations Development Programme, the UN's global development network)
- Making use of other networks

We acknowledge that it remains possible that there are coaching providers and communities in these countries we haven't yet discovered. This may be especially true, where organisations/people don't have internet access, are very locally organized and/or are operating and presenting themselves in a rarely known language.

However, we have assumed that if there was a strong, growing coaching industry in the country, we would have been able to discover it in the given time. As a result we can only give a very rough estimate/impression of the lack of coaching in these countries.

It remains our aim to get participants from all countries in future runs of the survey. In fact, the survey is work in progress, and we are happy to include anyone knowledgeable about coaching in these countries in the future.



Full colours = 97 participating countries (comprising about 88% of the world population); Light colours = 65 additionally researched countries (comprising about 12% of the world population) => overall coverage of 162 countries

C. THE 162 COVERED COUNTRIES

The Global Coaching Survey 2008/2009 covered 162 countries: 97 participating countries as well as 65 additionally researched countries:

THE 162 RESEARCHED COUNTRIES (IN ALPHABETICAL ORDER)

(comprising almost 100% of the world population)

Afghanistan	Central African Republic	Germany	Lebanon	North Korea	Sri Lanka
Albania	Chad	Ghana	Lesotho	Norway	Sudan
Algeria	Chile	Greece	Liberia	Oman	Surinam
Angola	China	Guatemala	Libya	Pakistan	Swaziland
Argentina	Colombia	Guinea	Lithuania	Panama	Sweden
Armenia	Congo	Guinea-Bissau	Luxembourg	Papua New Guinea	Switzerland
Australia	Costa Rica	Guyana	Macedonia FYR	Paraguay	Syria
Austria	Croatia	Haiti	Madagascar	Peru	Tajikistan
Azerbaijan	Cuba	Honduras	Malawi	Philippines	Tanzania
Bahrain	Cyprus	Hungary	Malaysia	Poland	Thailand
Bangladesh	Czech Republic	Iceland	Mali	Portugal	Togo
Belarus	Dem. Rep. of Congo	India	Malta	Puerto Rico	Trinidad & Tobago
Belgium	Denmark	Indonesia	Mauritania	Qatar	Tunisia
Belize	Djibouti	Ireland	Mexico	Romania	Turkey
Benin	Dominican Republic	Israel	Moldova	Russia	Turkmenistan
Bhutan	Ecuador	Italy	Mongolia	Rwanda	Uganda
Bolivia	Egypt	Ivory Coast	Montenegro	Saudi Arabia	Ukraine
Bosnia & Herzegovina	El Salvador	Japan	Morocco	Senegal	United Arab Emirates
Botswana	Equatorial Guinea	Jamaica	Mozambique	Serbia	United Kingdom
Brazil	Eritrea	Jordan	Myanmar	Sierra Leone	Uruguay
Brunei	Estonia	Kazakhstan	Namibia	Singapore	USA
Bulgaria	Ethiopia	Kenya	Nepal	Slovakia	Uzbekistan
Burkina Faso	Finland	Kuwait	Netherlands	Slovenia	Venezuela
Burundi	France	Kyrgyzstan	New Zealand	Somalia	Vietnam
Cambodia	Gabon	Laos	Nicaragua	South Africa	Yemen
Cameroon	Gambia	Latvia	Niger	South Korea	Zambia
Canada	Georgia		Nigeria	Spain	Zimbabwe

THE 97 PARTICIPATING COUNTRIES (IN ALPHABETICAL ORDER)

(comprising about 88% of the world population)

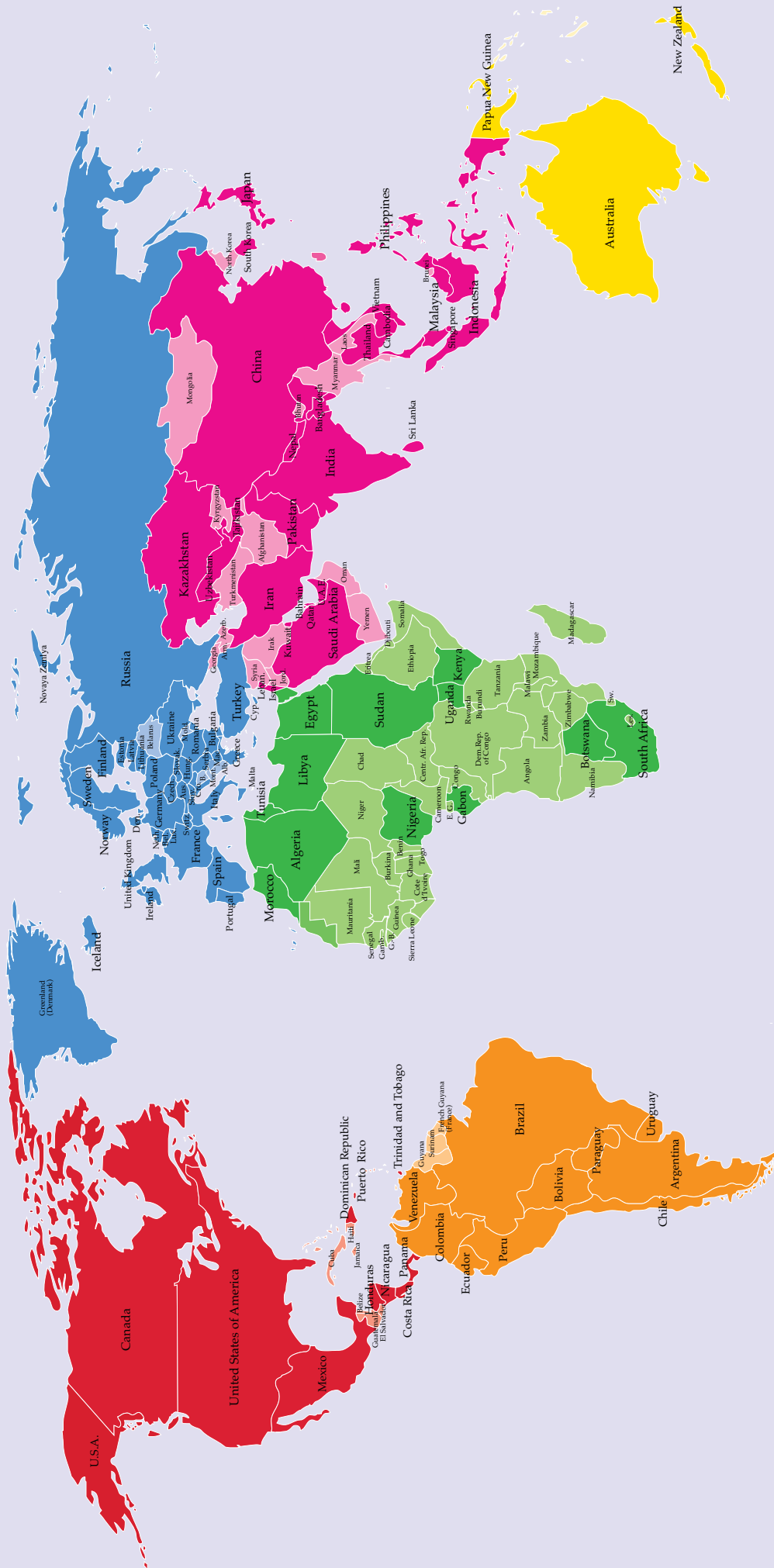
Algeria	Finland	Malta	Slovenia
Argentina	France	Mexico	South Africa
Australia	Gabon	Morocco	South Korea
Austria	Germany	Nepal	Spain
Bahrain	Greece	Netherlands	Sri Lanka
Bangladesh	Honduras	New Zealand	Sudan
Belgium	Hungary	Nicaragua	Sweden
Bolivia	Iceland	Nigeria	Switzerland
Botswana	India	Norway	Tajikistan
Brazil	Indonesia	Pakistan	Thailand
Bulgaria	Iran	Panama	Trinidad & Tobago
Cambodia	Ireland	Papua New Guinea	Tunisia
Canada	Israel	Paraguay	Turkey
Chile	Italy	Peru	Uganda
China	Japan	Philippines	Ukraine
Colombia	Kazakhstan	Poland	United Arab Emirates
Costa Rica	Kenya	Portugal	United Kingdom
Croatia	Kuwait	Puerto Rico	Uruguay
Cyprus	Latvia	Qatar	USA
Czech Republic	Lebanon	Romania	Uzbekistan
Denmark	Libya	Russia	Venezuela
Dominican Republic	Lithuania	Saudi Arabia	Vietnam
Ecuador	Luxembourg	Serbia	
Egypt	Macedonia FYR	Singapore	
Estonia	Malaysia	Slovakia	

THE 65 ADDITIONALLY RESEARCHED COUNTRIES (IN ALPHABETICAL ORDER)

(comprising about 12 % of the world population)

Afghanistan	Cuba	Jordan	Oman
Albania	Dem. Rep. of Congo	Kyrgyzstan	Rwanda
Angola	Djibouti	Laos	Senegal
Armenia	El Salvador	Lesotho	Sierra Leone
Azerbaijan	Equatorial Guinea	Liberia	Somalia
Belarus	Eritrea	Madagascar	Surinam
Belize	Ethiopia	Malawi	Swaziland
Benin	Gambia	Mali	Syria
Bhutan	Georgia	Mauritania	Tanzania
Bosnia and Herzegovina	Ghana	Moldova	Togo
Brunei	Guatemala	Mongolia	Turkmenistan
Burkina Faso	Guinea	Montenegro	Yemen
Burundi	Guinea-Bissau	Mozambique	Zambia
Cameroon	Guyana	Myanmar	Zimbabwe
Central African Republic	Haiti	Namibia	
Chad	Ivory Coast	Niger	
Congo	Jamaica	North Korea	

THE 162 COVERED COUNTRIES



Full colours = 97 participating countries
 Light colours = 65 additionally researched countries

D. FURTHER REMARKS

It is the first time that coaching associations from all over the world were identified, contacted and successfully brought together in a big project like this. The list of participating organisations and people alone is worth reading.

Remarkably, just two of all participants mentioned the financial crisis in their answers - and this only marginally. Therefore, when the answers were generated (2008 and early 2009), the financial crisis hadn't already hit the coaching market in a significant way. This makes the Global Coaching Survey 2008/2009 particularly important and valuable: It is not just the snapshot of very exceptional circumstances. It reflects and documents the state and (longer term) development of coaching right up to the point before any potential volatility in the coaching market due to the global crisis occurred.

The European pilot

The design of the Global Coaching Survey is in principle a global extension of the design of the highly successfully run European pilot that took place in 2007/2008 (European Coaching Survey 2007/2008). Media around the world reported on it (e.g. Financial Times, FTD). The report has been downloaded thousands of times, and is adding real value to clients and other companies around the world.

The Global Coaching Survey 2008/2009 has now incorporated and includes the European Coaching Survey. The data from 2007/2008 were updated and refreshed. In addition, 6 more European countries (41 instead of 35) were covered in 2008/2009.

Research on coaching only

The Global Coaching Survey documents the situation of coaching across the globe.

The borders of the world continents were marked in accordance with widely found best practices in doing this. We are, however, aware of the fact that some countries can be seen as part of one continent or another. Where we included a country in a continent, this should not be (mis)interpreted as a political statement, but as a search for a most practical solution for the survey. For example, we included Russia and Turkey in Europe, simply because we had included these in the European pilot (European Coaching Survey 2007/2008).

While we find the division into continents very helpful overall, we also acknowledge it doesn't fit perfectly in all cases. For example, the Middle East may rightly be seen as a region in its own right, but spans southeastern Europe, northeastern Africa and southwestern Asia. So interested readers need to look into all three continents to get an overview of coaching in this region.

The continent colours used in the maps are chosen for reasons of good visibility/ visual illustration purposes only. We checked that there are no cultural reservations towards any continent colour. However, if there is from your perspective, please let us know, so that we may take this into account in the future.

We are aware of existing debates on the legal status and recognition of some regions in the world as countries. Also in this regard, we emphasize this report is neutral. It is research on coaching only and not to be (mis-)interpreted as a political statement in any way.

In this report, we include figures/calculations on the basis of world or country population numbers (e.g. number of inhabitants per coach). The source of the underlying population numbers is the 2008 World Population Data Sheet (Population Reference Bureau, PRB, 2008).

Please quote the results of this report appropriately and carefully, as taking single figures out of context may lead to misinterpretations. Interestingly, some specific answers get a totally new meaning, put in the context of answers from the country or region or the whole report.

Share your knowledge – your contribution is welcome

If you want to share your expertise/thoughts on coaching in your continent, region or country, please send an email to: info@bresser-consulting.com

If you would like to contribute to the next survey, please let us know and we can consider you as a future survey participant.

If you want to comment and share your thoughts on the survey, give constructive feedback and/or tell us how you make use of the results, please send an email to: info@bresser-consulting.com

If you are or know someone who is a true expert in coaching for a specific region or country, please also let us know, and we will consider including you/the person in our high-quality expert network.

E. REPORT EDITIONS

There are different editions of this report available that can all be downloaded from the following website for free:

www.frank-bresser-consulting.com/globalcoachingsurvey.html

- Complete edition: The whole report
- Executive Summary only
- Special edition Africa (African Coaching Survey 2008/2009)
- Special edition Asia (Asian Coaching Survey 2008/2009)
- Special edition Australasia (Australasian Coaching Survey 2008/2009)
- Special edition Europe (European Coaching Survey 2008/2009)
- Special edition North America (North American Coaching Survey 2008/2009)
- Special edition South America (South American Coaching Survey 2008/2009)
- Special edition World overall and comparison of continents

F. FRANK BRESSER CONSULTING

The research project was initiated and conducted by Frank Bresser Consulting.

Frank Bresser is the global business expert for the successful implementation and improvement of coaching in organisations. Supported by his worldwide team of assistant consultants, he advises companies on the effective use of coaching. His expertise is used and put in practice successfully in organisations across the globe and has set international standards in the implementation and improvement of coaching.

More information at:

www.frank-bresser-consulting.com

Frank Bresser Consulting is already renowned for its international, leading-edge research contributions in the field of coaching (e.g. Coaching Research Project 2005; Transatlantic Coaching Pilot Project; The 12 Dimensions of Coaching; European Coaching Survey 2007/2008).

The key people involved in the realisation of the Global Coaching Survey 2008/2009 are:

Frank Bresser, Head of Frank Bresser Consulting, is the initiator and head of the Global Coaching Survey and the author of this report.

Lutz Stradmann, Consultant at Frank Bresser Consulting, assisted as co-manager, -coordinator and co-editor.

Amanda Bouch, Consultant at Frank Bresser Consulting, assisted as advisor and co-editor.

This report is designed by depunkt, cologne, germany:
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II. THE RESULTS

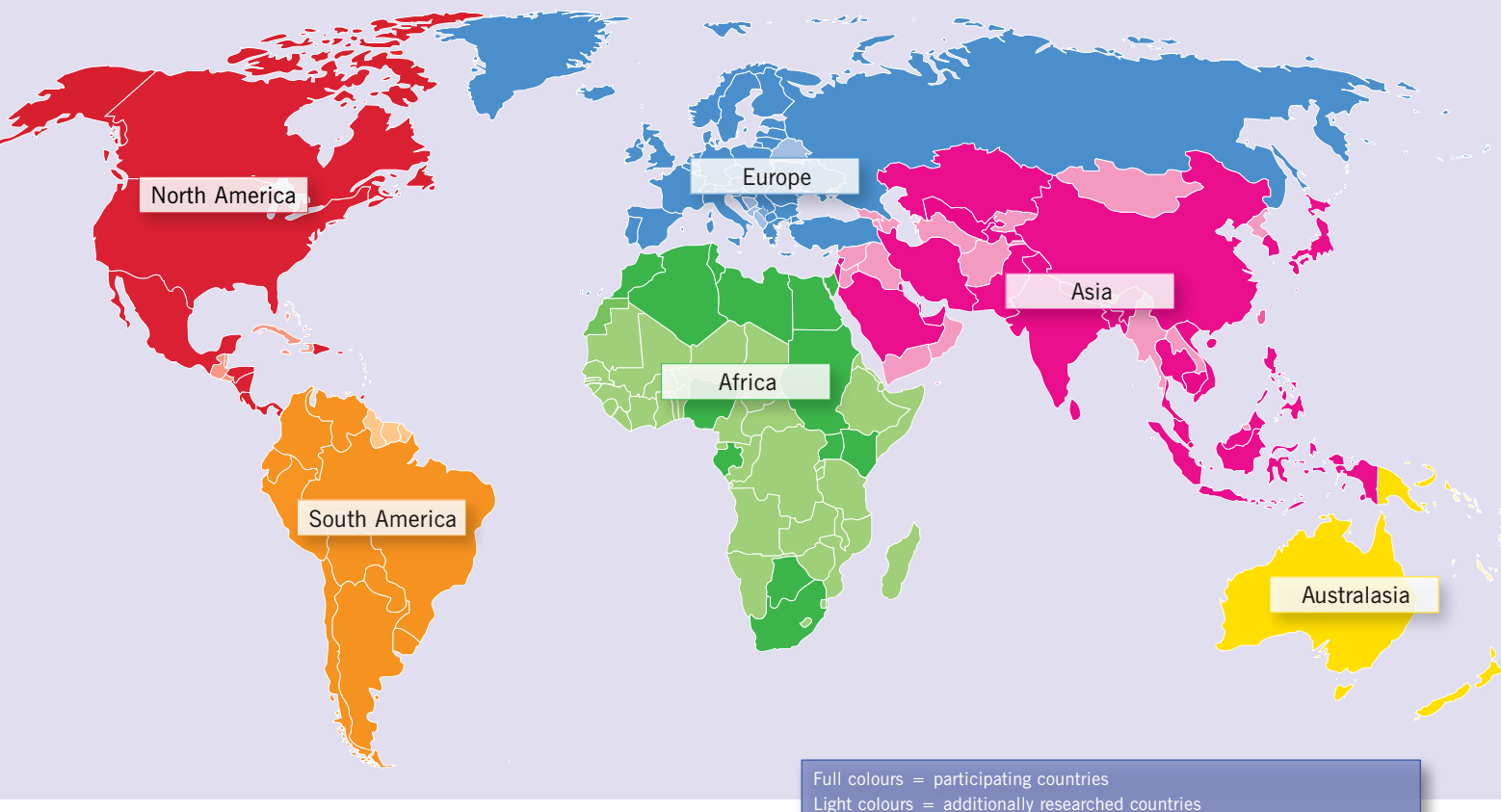
We will first cover the situation of coaching in the world overall and then go into detail for each continent in alphabetical order.

- **WORLD OVERALL**
- **AFRICA**
- **ASIA**
- **AUSTRALASIA**
- **EUROPE**
- **NORTH AMERICA**
- **SOUTH AMERICA**

For ease of reading and information finding, all chapters are structured in the same way: After giving an overview of key facts and figures, the main themes are addressed one-by-one and illustrated by graphs and tables. Finally, the situation of coaching in the different regions of each continent is set out.

Keep in mind that in many cases responses by participants are rough estimates. Coaching is a young discipline, and exact figures are rarely available (e.g. as most countries have no requirement to register as a coach, it is difficult to identify their number of coaches). So whilst the survey can provide a good first idea of coaching around the world, in each continent, region and country, it is far from being absolutely accurate. Where the results open up controversial discussions, this is welcome and in the spirit of the survey.

A. WORLD OVERALL



WORLD OVERALL

Covered continents and countries within each continent
(in alphabetical order):

AFRICA: 48 COUNTRIES

Algeria, Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Central African Republic, Chad, Congo, Dem. Rep. of Congo, Djibouti, Egypt, Equatorial Guinea, Eritrea, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Ivory Coast, Kenya, Lesotho, Liberia, Libya, Madagascar, Malawi, Mali, Mauritania, Morocco, Mozambique, Namibia, Niger, Nigeria, Rwanda, Senegal, Sierra Leone, Somalia, South Africa, Sudan, Swaziland, Tanzania, Togo, Tunisia, Uganda, Zambia, Zimbabwe

ASIA: 42 COUNTRIES

Afghanistan, Armenia, Azerbaijan, Bahrain, Bangladesh, Bhutan, Brunei, Cambodia, China, Georgia, India, Indonesia, Iran, Israel, Japan, Jordan, Kazakhstan, Kuwait, Kyrgyzstan, Laos, Lebanon, Malaysia, Mongolia, Myanmar, Nepal, North Korea, Oman, Pakistan, Philippines, Qatar, Saudi Arabia, Singapore, South Korea, Sri Lanka, Syria, Tajikistan, Thailand, Turkmenistan, United Arab Emirates, Uzbekistan, Vietnam, Yemen

AUSTRALASIA: 3 COUNTRIES

Australia, New Zealand, Papua New Guinea

EUROPE: 41 COUNTRIES

Albania, Austria, Belarus, Belgium, Bosnia and Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Macedonia F.Y.R., Malta, Moldova, Montenegro, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine, United Kingdom

NORTH AMERICA: 16 COUNTRIES

Belize, Canada, Costa Rica, Cuba, Dominican Republic, El Salvador, Guatemala, Haiti, Honduras, Jamaica, Mexico, Nicaragua, Panama, Puerto Rico, Trinidad & Tobago, USA

SOUTH AMERICA: 12 COUNTRIES

Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Guyana, Paraguay, Peru, Surinam, Uruguay, Venezuela

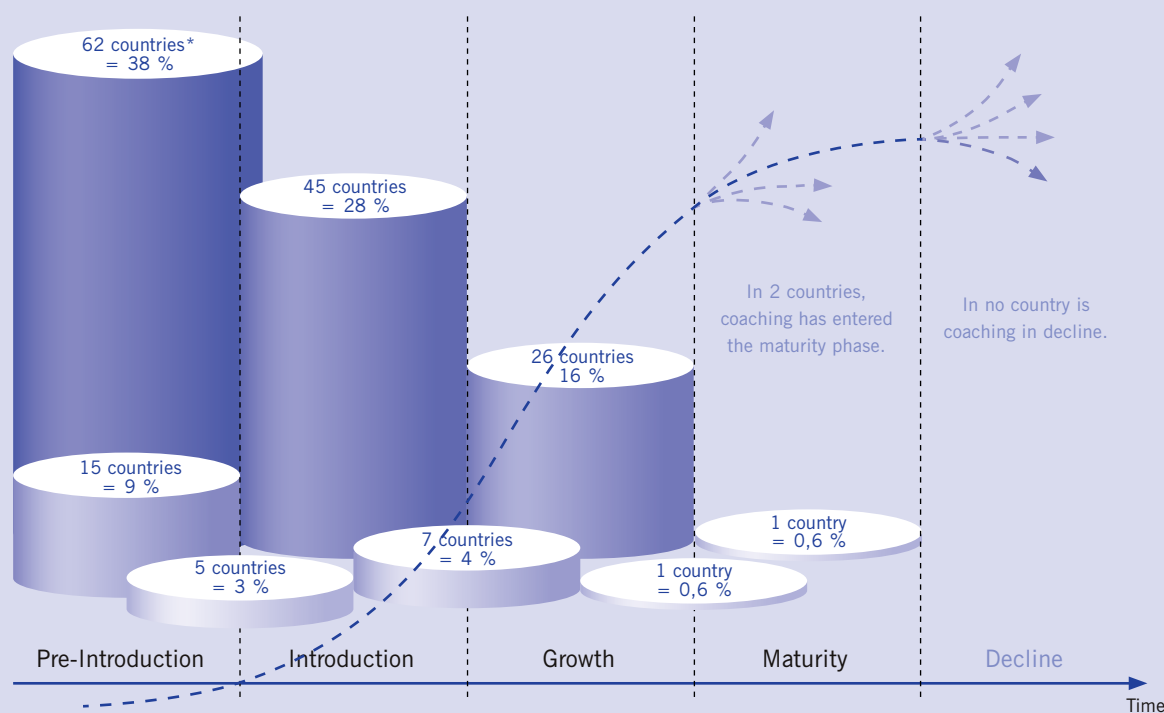


Figure: Product-life-cycle stage of coaching in the 162 countries (number and percentage of countries in each stage)

* = countries that are in the pre-introduction phase and possibly early introduction

1. OVERVIEW

There are about 43,000-44,000 business coaches minimum operating in the world.

Coaching is definitely a global phenomenon; the top 10 countries with the highest numbers of coaches include an Asian, an African and a South American country (Japan, South Africa, Brazil). However, there remain extreme differences in the development and size of coaching markets depending on each continent and country.

Europe, North America and Australia – representing just 20% of the world population - comprise 80% of all business coaches of the world. More than two thirds of all coaches are based in the European Union, USA and Canada which represent just 13% of the world population.

Specifically: The 7 countries with the highest numbers of coaches (US, UK, Germany, Australia, Japan, Canada, South Africa) comprise only 10% of the world population, but about 73% of all coaches.

Coaching is on the rise across the globe and there are singular, highly developed and dynamic “centres” of coaching. But comprehensive area-wide coverage of coaching is far from a reality. This is true for all continents.

This can be further illustrated by the following findings:

- Coaching is already widely accepted and used as a business tool in 28 countries (of these 14 are European). However, in 114 countries (about 70% of all countries), it is not. In another 20 countries, this is undecided.
- In 33 countries, coaching is in the growth phase (7 of these in early stages of growth). In a further 50 countries coaching has entered the introduction phase (5 of these being in between pre-introduction and introduction). In the remaining 77 countries (nearly 50%), business coaching hasn't yet visibly developed. In two countries (Norway and the Netherlands), coaching has already entered the maturity phase. (see figure above)
- In 27 countries from all continents, business coaching is well advanced towards becoming a profession (15 from Europe). However, in 125 countries, i.e. in nearly four fifths of all countries, it is not. In 10 countries, this is undecided.
- National and international coaching associations exist in Northern America, Europe, and Australasia. There are also some in South America, but few in Asia and even less in Africa. In nearly half of the 162 countries, there is no

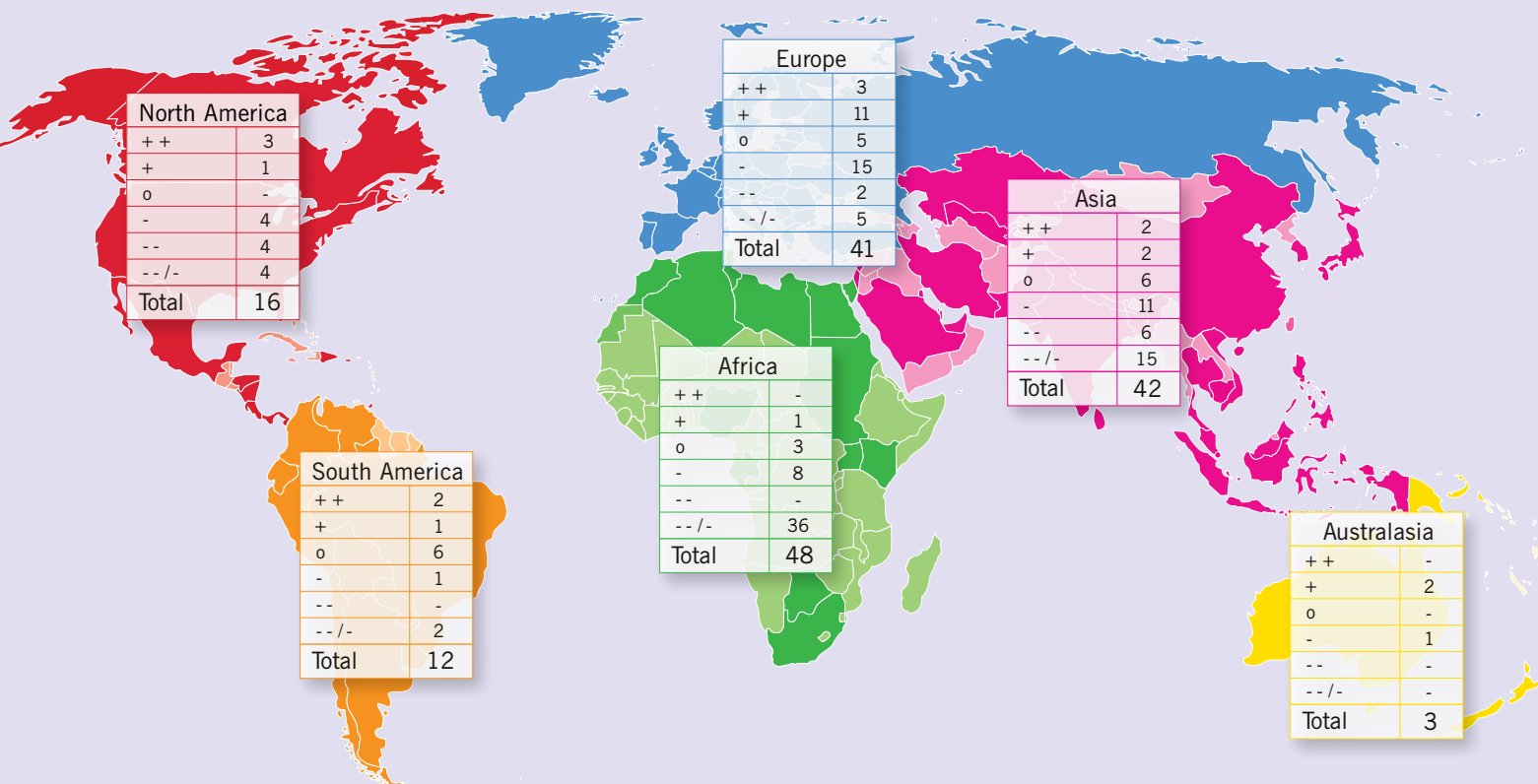
single member of any national or international coaching body in the country.

- The concept of coaching cultures is quite well known in 19 countries. In a further 29 countries there is slight knowledge and use of it. However, in 111 countries, the concept is hardly or not known at all.
- There is an overall balance of directive and non-directive coaching approaches in the world. The predominant coaching style is directive in 28 countries, non-directive in 24 countries. In 110 countries, this is undecided.
- The use of coach supervision is widely spread in 23 countries (around 15% of all countries).

Generally speaking, there is no dominant picture of coaching yet and diversity prevails. There is not the African, Asian, Australasian, European, North American or South American approach. But you need to look into each continent to find out more.

2. MAIN THEMES

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



a Acceptance and use of coaching

Question asked:

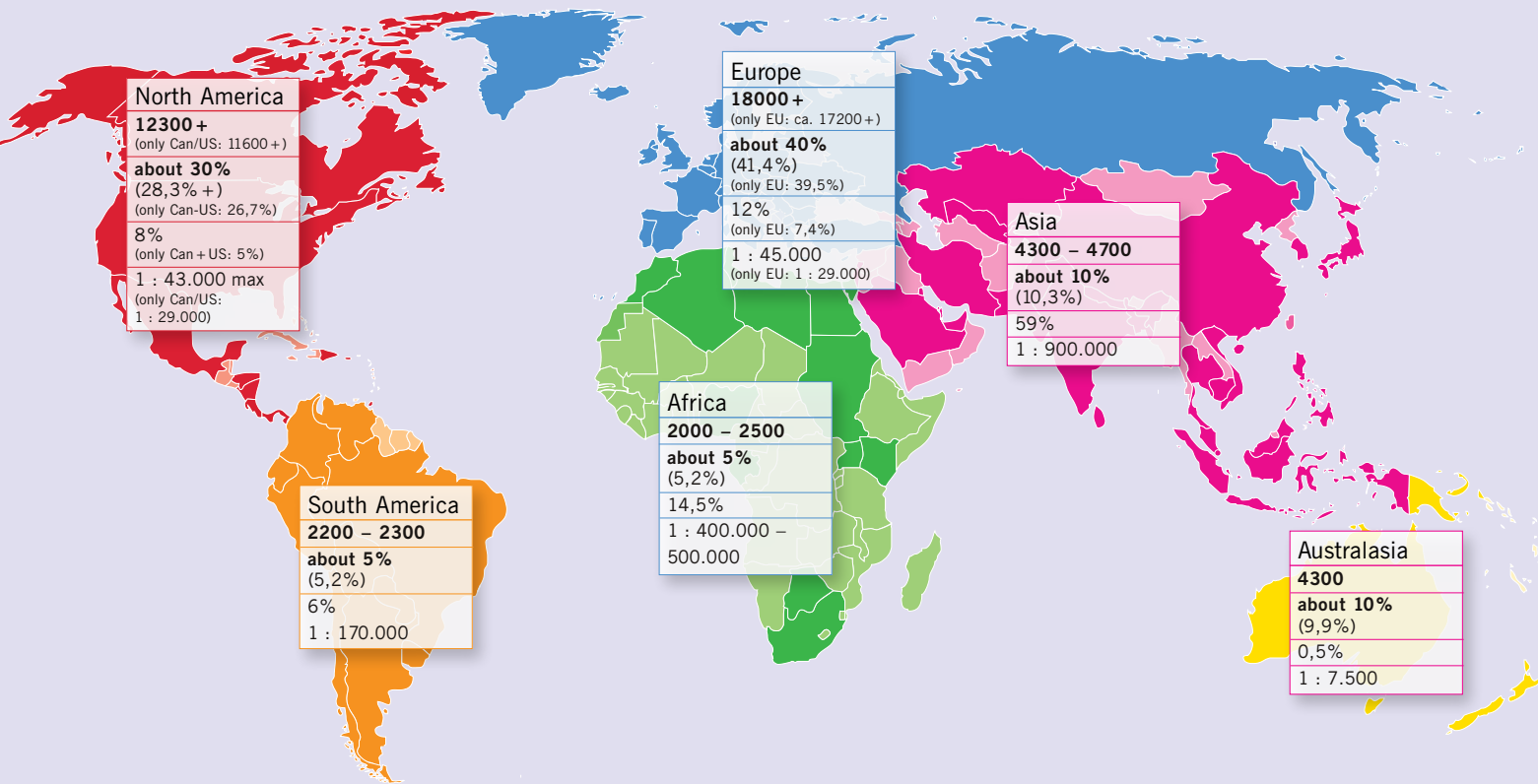
Is professional one-to-one coaching widely accepted and used as a business tool in your country today?

++	Agree strongly	10
+	Agree	18
o	Undecided	20
-	Disagree	40
--	Disagree strongly	12
-- /-	countries where it is unclear whether it is "disagree" or "strongly disagree"	62
Total		162

Coaching is already widely accepted and used as a business tool in 28 countries (of these 14 are European). However, in 114 countries (about 70% of all countries), it is not. In another 20 countries, this is undecided.

The 28 countries where coaching is widely accepted and used:

- Morocco
- Belgium
- Spain
- Argentina
- Japan
- Denmark
- Sweden
- Colombia
- Malaysia
- Finland
- Switzerland
- Peru
- Singapore
- France
- United Kingdom
- South Korea
- Germany
- Canada
- Australia
- Ireland
- Mexico
- New Zealand
- Italy
- Puerto Rico
- Netherlands
- USA
- Norway
- Portugal



b Number of professional business coaches

Question asked:

How many professional one-to-one business coaches are there in your country?

There are about 43,000-44,000 business coaches minimum operating in the world.

Coaching is definitely a global phenomenon; the top 10 countries with the highest numbers of coaches include an Asian, an African and a South American country (Japan, South Africa, Brazil). However, there remain extreme differences in the development and size of coaching markets depending on each continent and country.

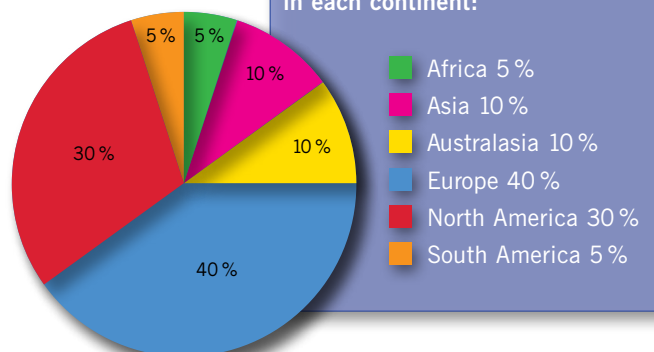
Europe, North America and Australia – representing just 20% of the world population - comprise 80% of all business coaches of the world. More than two thirds of all coaches are based in the European Union, USA and Canada which represent just 13% of the world population.

Europe is the continent (18,000), US the country (10,000 minimum) with the highest number of business coaches.

WORLD OVERALL	
Number of coaches	43000 – 44000 minimum (rough final estimate: 45.000 – 50.000)
Percentage of coaches worldwide	100%
Percentage of world population	100%
Density of coaches (1 Coach per number of inhabitants)	1 : 154.000 max

The figures in the map generally include all coaches offering business coaching – no matter whether they do this full or part time, with or without being accredited as a coach, as a member of a coaching association or not. Not included in the numbers are generally managers/leaders/consultants just doing their job in a coaching style.

Rough percentages of all one-to-one business coaches worldwide in each continent:



Specifically: The 7 countries with the highest numbers of coaches (US, UK, Germany, Australia, Japan, Canada, South Africa) comprise only 10% of the world population, but about 73% of all business coaches.

The top 10 countries with the highest numbers of business coaches:

1. US	10,000+
2. UK	7,500
3. Germany	5,000
4. Australia	4,000
5. Japan	2,000
6. Canada	1,600+
7. South Africa	1,600
8. France	1,000+
9. Brazil	1,000
10. Italy	700 - 1,000
Total	= 34,400+
(= 79% minimum of all business coaches worldwide) (comprising 17% of the world population)	

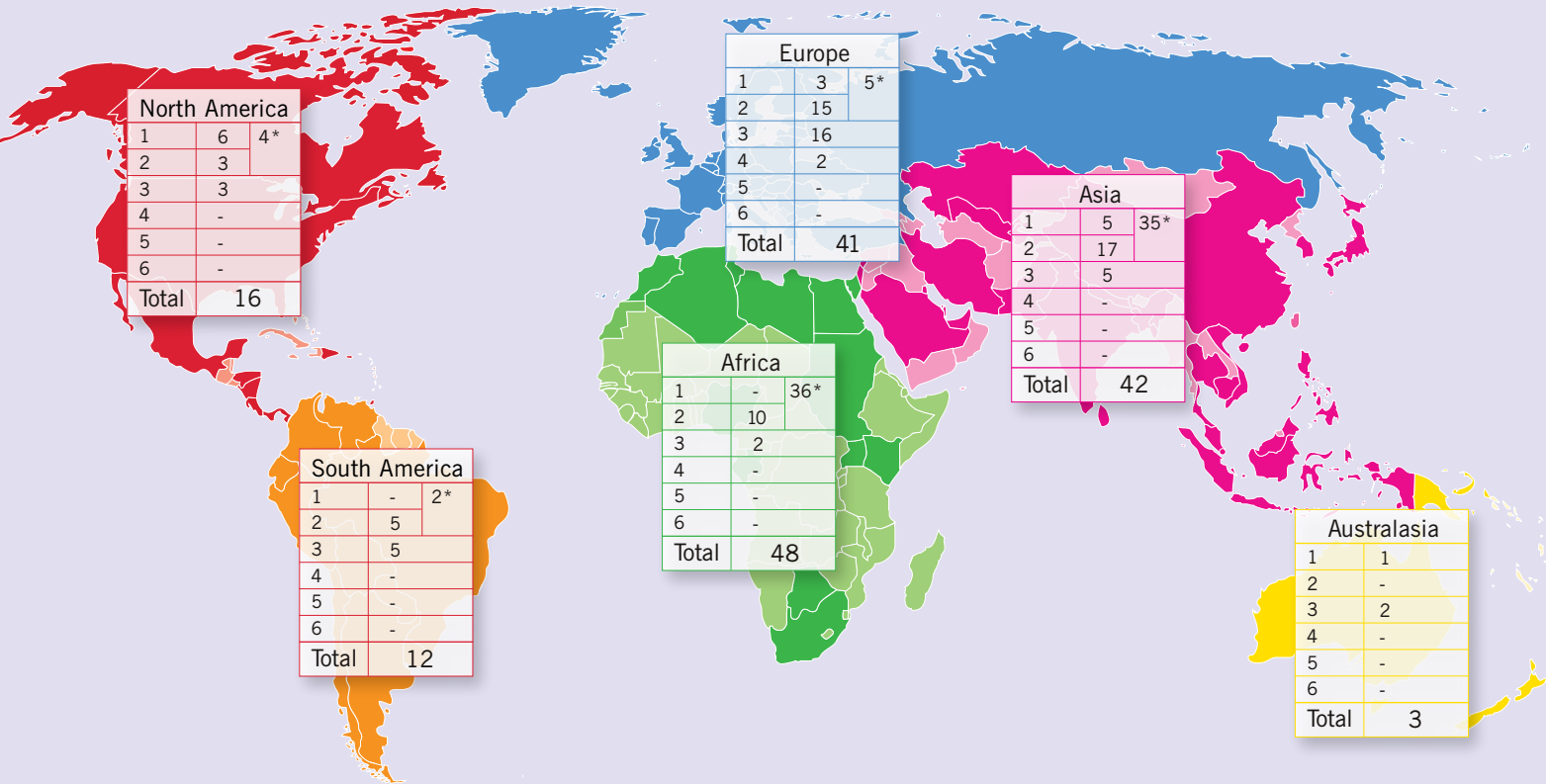
Density of coaches

Australasia is the continent with the highest density of coaches (1 business coach per 7.500 inhabitants), Australia the country with the highest density (1 : 5.300).

Countries with the highest densities of coaches

(1 : 30,000 inhabitants and more)

1. Australia	1 : 5,300
2. Ireland	1 : 8,000
3. United Kingdom	1 : 8,000
4. Luxembourg	1 : 10,000
5. New Zealand	1 : 14,300
6. Germany	1 : 16,400
7. Sweden	1 : 18,000
8. Switzerland	1 : 16,000-27,000
9. Canada	1 : 20,000 (min.)
10. Slovakia	1 : 25,000
11. Norway	1 : 25,000
12. USA	1 : 30,000 (min.)
13. Netherlands	1 : 28,000 - 42,500
14. Iceland	1 : 30,000
15. Singapore	1 : 30,000
16. South Africa	1 : 30,000
17. United Arab Emirates	1 : 30,000
...	
28. Colombia (highest density in South America)	1 : 88,000



C Phase of coaching in its product life cycle

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?

1 Pre-introduction	15	62*
2 Introduction	50	
3 Growth	33	
4 Maturity	2	
5 Decline	-	
6 Relaunch	-	
Total	162	

* = countries either in the pre-introduction phase or maximum in the introduction phase (which one cannot be said with certainty from outside)

Coaching is on the rise across the globe. In 33 countries, coaching is in the growth phase. In a further 50 countries, coaching has entered the introduction phase. In the remaining 77 countries (nearly 50%), however, business coaching hasn't yet visibly developed. In two countries (Norway and the Netherlands), coaching has already entered the maturity phase. In no country is coaching in decline. (also see figure on p.28)

Maturity (2 countries):

- Norway
- Netherlands (3-4)

Growth (33 countries):

- Morocco
- South Africa

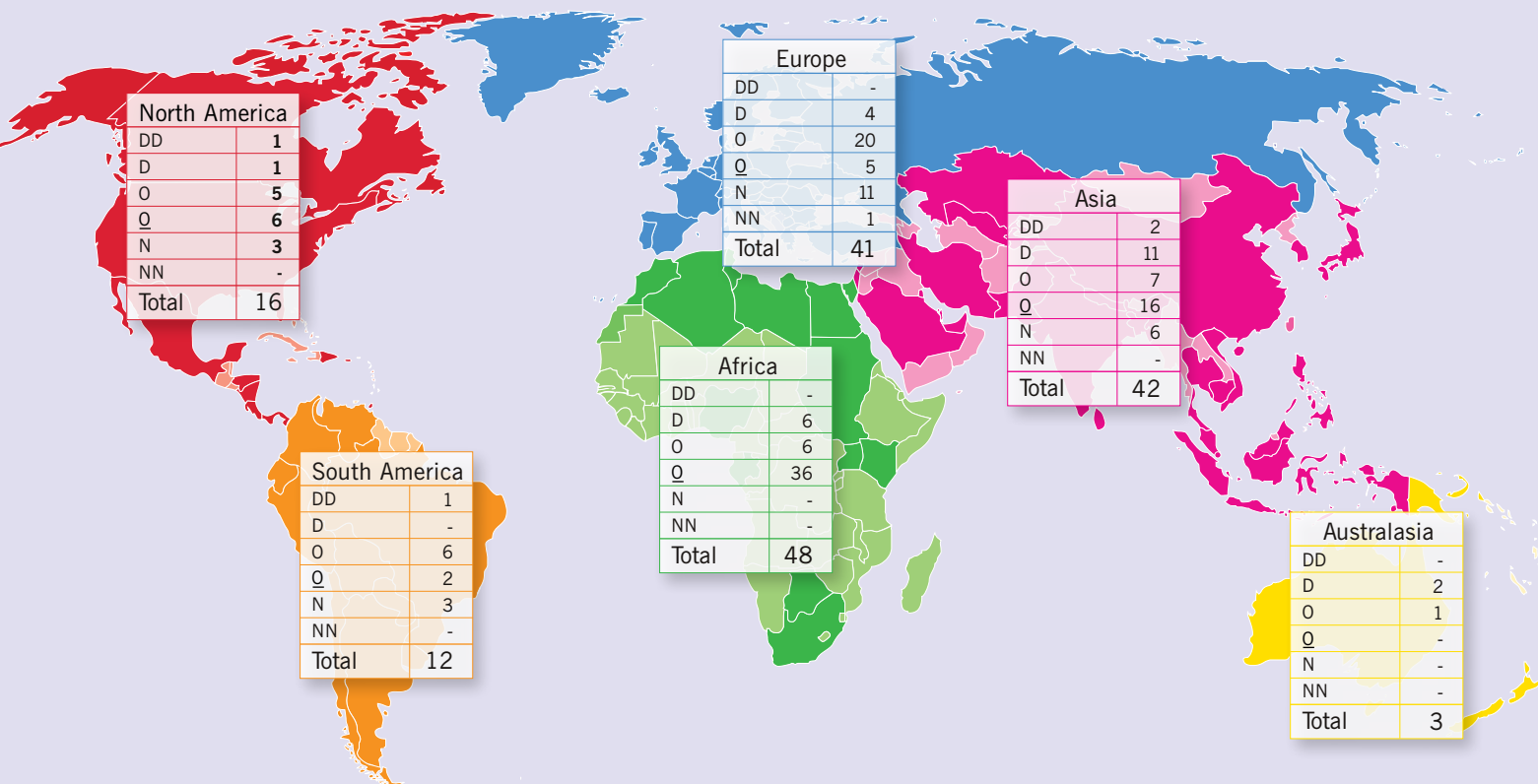
- Japan
- Philippines
- Singapore
- South Korea
- United Arab Emirates

- Australia
- New Zealand

- Austria
- Belgium
- Czech Republic
- Denmark

- France
- Germany
- Ireland
- Italy
- Lithuania
- Luxembourg
- Portugal
- Slovakia
- Spain
- Sweden
- Switzerland
- United Kingdom

- Canada
- Mexico
- USA
- Argentina
- Brazil
- Colombia
- Peru
- Chile



d Directive /non-directive coaching approach

Question asked:

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

There is an overall balance of directive and non-directive coaching approaches in the world. The predominant coaching style is directive in 28 countries, non-directive in 24 countries. In 110 countries, this is undecided.

Highly developed coaching industries with either approach exist and both are successful. So there is no prevailing coaching style globally.

For example, coaching is predominantly non-directive in US and UK and directive in Ireland, Australia and New Zealand at the same time. The Anglo-Saxon region is not homogeneous in terms of coaching style and practice across the globe.

Iceland is the only country with a highly non-directive coaching approach – Bangladesh, Pakistan, Honduras and Ecuador are the only countries with a highly directive coaching approach.

DD	Highly directive	4
D	Directive	24
O	Undecided	45
Q	Undecided*	65
N	Non-directive	23
NN	Highly non-directive	1
Total		162

*Q = undecided because there is no visible coaching industry in the country yet, that could be identified from outside

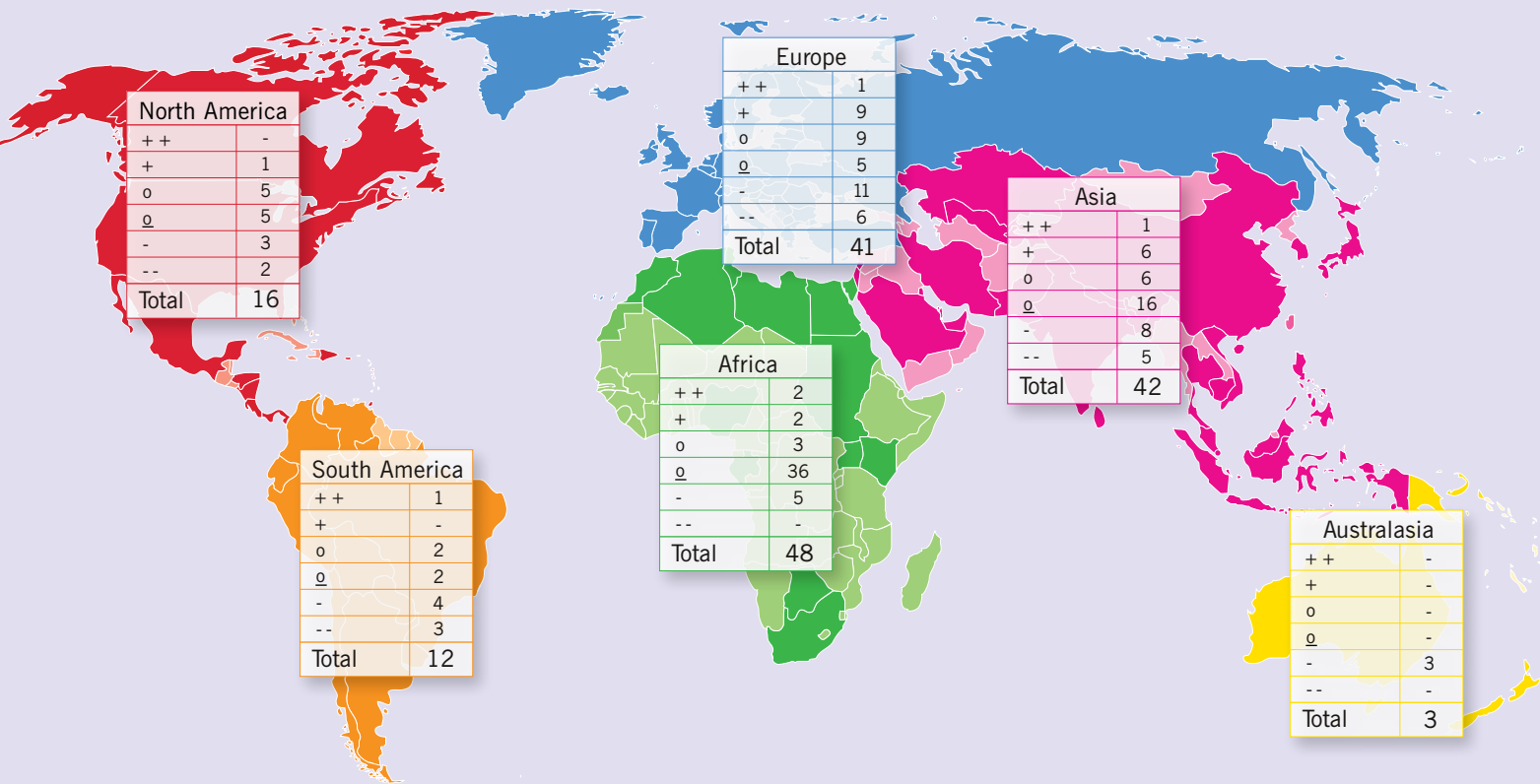
e Regional characteristics of coaching

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)?

There are many different local characteristics and preferences in the way coaching is understood and delivered. In each continent chapter, you will find more information on these typical characteristics.

Generally speaking, there is no consistent picture of coaching yet, but diversity prevails. For example, there is not *the* African, Asian, Australasian, European, North American or South American approach. But you need to look at each region and country to find out more.



f Use of supervision by coaches

Question asked:

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

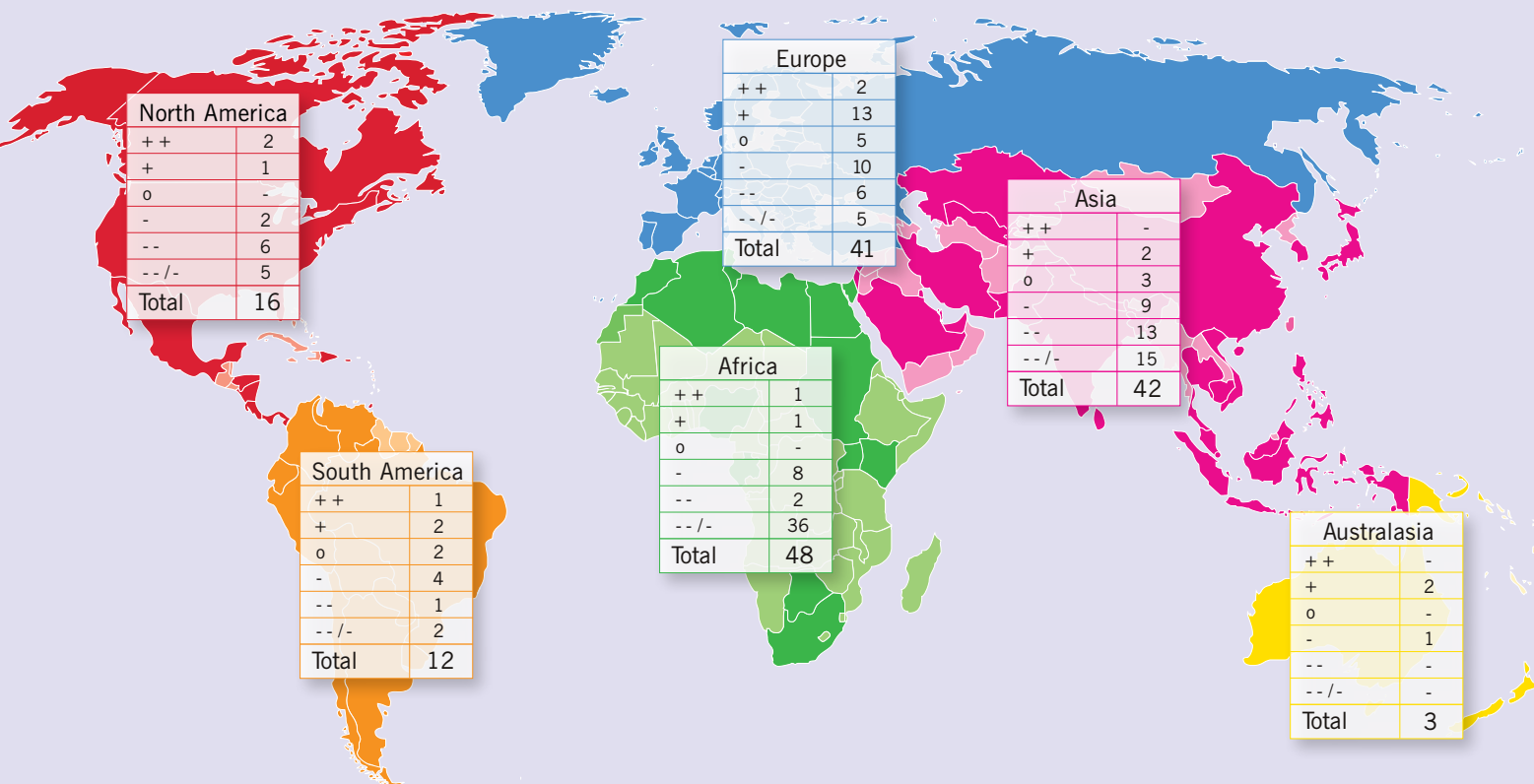
++	Agree strongly	5
+	Agree	18
o	Undecided	25
o	Undecided*	64
-	Disagree	34
--	Disagree strongly	16
Total		162

*o = undecided because there is no visible coaching industry in the country yet, that could be identified from outside

The use of supervision is widely spread in 23 countries (around 15% of all countries). However, there are also highly developed coaching markets that currently don't make any major use of coach supervision (e.g. Australia, New Zealand, Canada, Spain, Ireland, Italy, Singapore, United Arab Emirates, Argentina, Brazil, Chile, South Africa).

Supervision is widely spread in:

- Botswana
- Japan
- Belgium
- USA
- Morocco
- Kuwait
- Denmark
- Venezuela
- Nigeria
- Nepal
- France
-
- Sudan
- Saudi Arabia
- Germany
-
-
- South Korea
- Iceland
-
-
- Thailand
- Luxembourg
-
-
- Vietnam
- Slovenia
-
-
-
- Switzerland
-
-
-
- Ukraine
-
-
-
- United Kingdom



g Coaching on its way to becoming a real profession

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.)?

++	Agree strongly	6
+	Agree	21
o	Undecided	10
-	Disagree	34
--	Disagree strongly	28
-- /-	countries where it is unclear whether it is "disagree" or "strongly disagree"	63
Total		162

In 27 countries from all continents, business coaching is already far advanced on its way to becoming a real profession (15 from Europe). However, in 125 countries, i.e. in nearly four fifth of all countries, it is not. In 10 countries, this is undecided.

National and international coaching associations exist in Northern America, Europe, and Australasia. There are also some in South America, but few in Asia and even less in Africa. In nearly half of the 162 countries, there is no single member of any national or international coaching body in the country.

Remarkably, all major coaching associations that are operating globally, have an Anglo-Saxon origin and headquarter (e.g. ICF, WABC and IAC from the US/Canada; AC and ICC – the latter one being rather a coach network only - from UK).

On a more regional or continent level, also coaching associations of other origins are starting to emerge, e.g. the AEC (Association Européenne de Coaching) from France collaborating with the

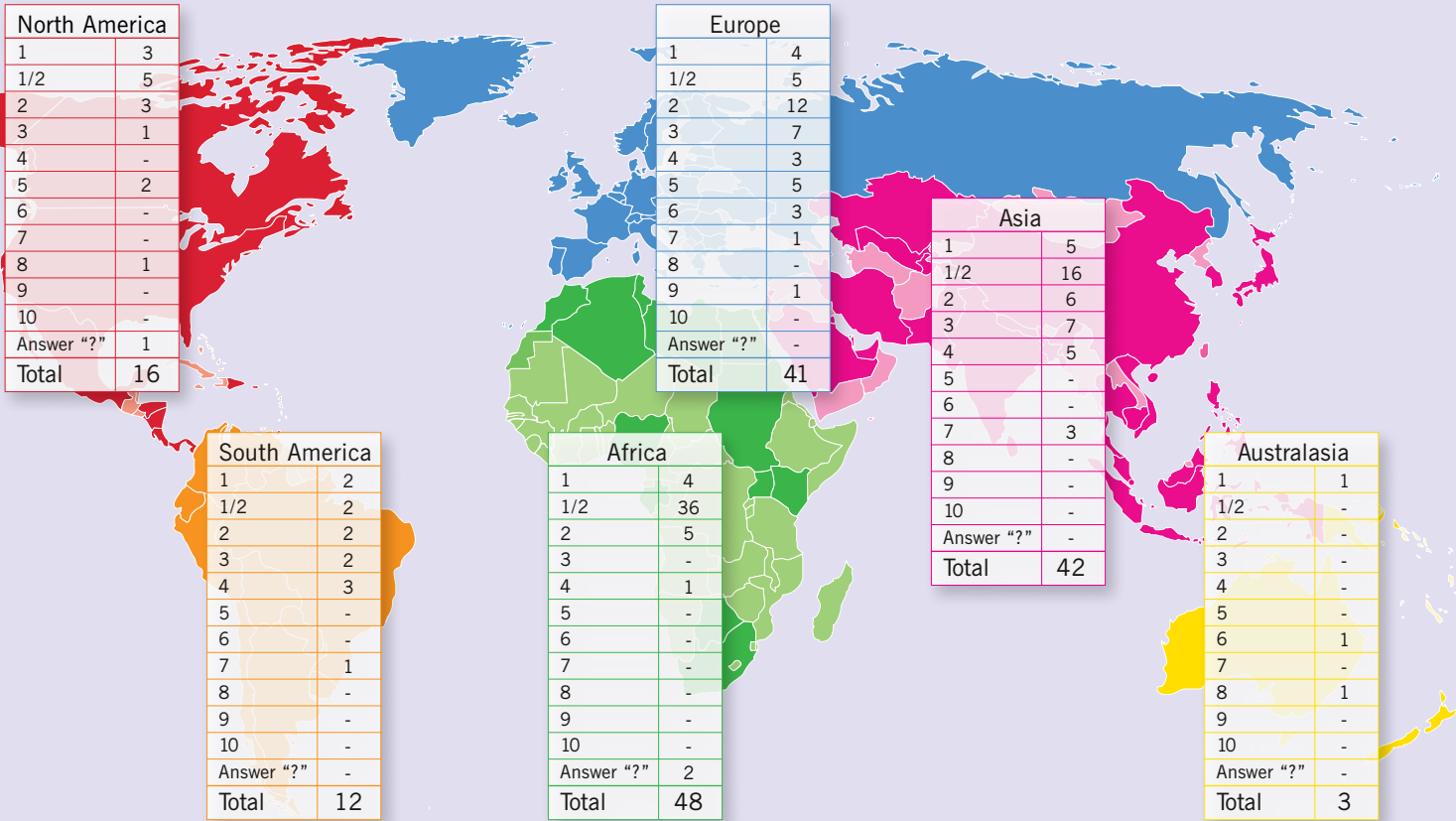
EMCC (European Mentoring & Coaching Council) from UK in Europe, the APAC (Asia Pacific Alliance of Coaches) in Asia and the currently emerging FIAC (Federación Iberoamericana de Asociaciones de Coaching) in the Ibero-American area.

There is a national coaching association in Morocco (i.e. Maroc Coaching) which seems to be the first (and only) existing coaching association headquartered in an Arabian country.

All coaching communities generally support and have a code of ethics. The importance and practice of coach accreditation varies significantly throughout the world.

Countries where coaching is far advanced as a profession:

Morocco	Belgium	Slovakia	Argentina
South Africa	Czech Republic	Spain	Chile
	Denmark	Sweden	Peru
Japan	France	Switzerland	
South Korea	Germany	United Kingdom	
	Ireland		
Australia	Netherlands	Canada	
New Zealand	Norway	Puerto Rico	
	Portugal	USA	
	Romania		



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

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)?

1	not at all	19
1/2*		64
2		28
3		17
4		12
5		7
6		4
7		5
8		2
9		1
10	very much	-
Answer “?”		3
Total		162

*1/2 = either 1 or 2, but very low

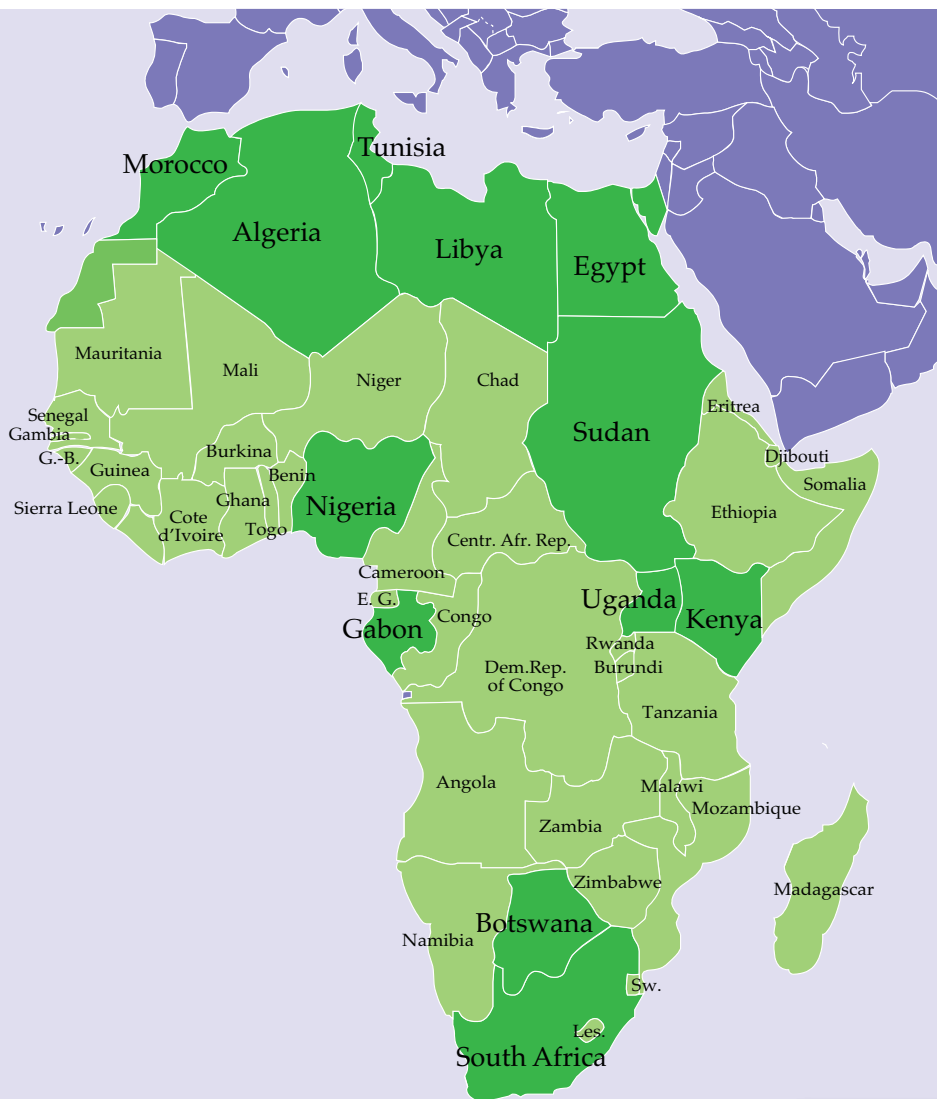
The concept of coaching cultures is quite well known in 19 countries. In a further 29 countries there is slight knowledge and use of it. However, in 111 countries, the concept is hardly or not known at all.

The 8 countries with the highest numbers (at least 7)

- Netherlands 8 - 9
- USA 8
- New Zealand 8
- Argentina 7
- Japan 7
- Philippines 7
- Luxembourg 7
- Malaysia 6 - 7
- ...
- (South Africa) 4 (multinationals: 8)

B. SITUATION IN EACH CONTINENT

1 . A F R I C A



Full colours = participating countries
Light colours = additionally researched countries

AFRICA

48 covered African countries (in alphabetical order):

Algeria	Djibouti	Liberia	Senegal
Angola	Egypt	Libya	Sierra Leone
Benin	Equatorial Guinea	Madagascar	Somalia
Botswana	Eritrea	Malawi	South Africa
Burkina Faso	Ethiopia	Mali	Sudan
Burundi	Gabon	Mauritania	Swaziland
Cameroon	Gambia	Morocco	Tanzania
Central African Republic	Ghana	Mozambique	Togo
Chad	Guinea	Namibia	Tunisia
Congo	Guinea-Bissau	Niger	Uganda
Cote d'Ivoire	Kenya	Nigeria	Zambia
Dem. Rep. of Congo	Lesotho	Rwanda	Zimbabwe

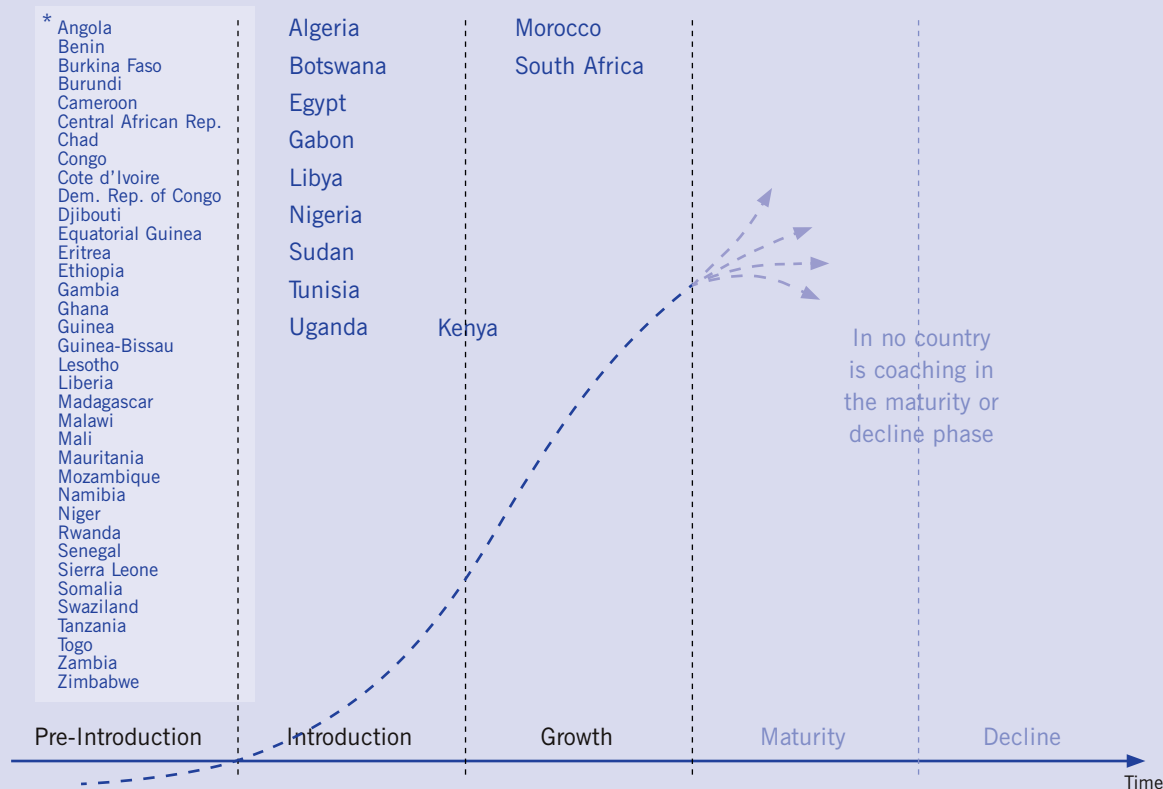


Figure: Current product-life-cycle stage of coaching in Africa

* = countries in the pre-introduction phase and possibly early introduction

1.1 OVERVIEW

There are about 2,000-2,500 business coaches operating in Africa.

South Africa – with about 5% of the African population – has around 1600 business coaches comprising about 70% of the total. Approximately 12% of African coaches (260) are based in Egypt, Kenya and Morocco, so the other 44 African countries have the remaining 18% of business coaches on the continent.

The density of coaches in Africa is 1 coach per 400,000-500,000 inhabitants (without South Africa it would be 1 coach per 1-2.3 million inhabitants).

In Africa, coaching is still in its infancy. The following findings illustrate this further:

- Only in Morocco is coaching already widely accepted and used as a business tool. In three other countries (South Africa, Egypt, Libya) this is undecided.
- In two countries (Morocco and South Africa) coaching is already in the growth phase, and in another 9 countries it is in the introduction phase. In the remaining 36 countries, however, business coaching hasn't yet visibly developed. (see figure above)

- In Morocco and South Africa, one-to-one business coaching is already well advanced towards becoming a profession. In all other 46 countries, it is not. No country is undecided.

- National coaching associations have successfully developed in Morocco and South Africa. Emerging coaching communities may also be found in Uganda and Nigeria. However, the overall situation with regard to professional coaching bodies in Africa (national or international ones) is very poor.

- The coaching culture concept is almost unknown in Africa. Only in South Africa, and here above all in the context of multinational companies rather than in local companies, is it mentioned.

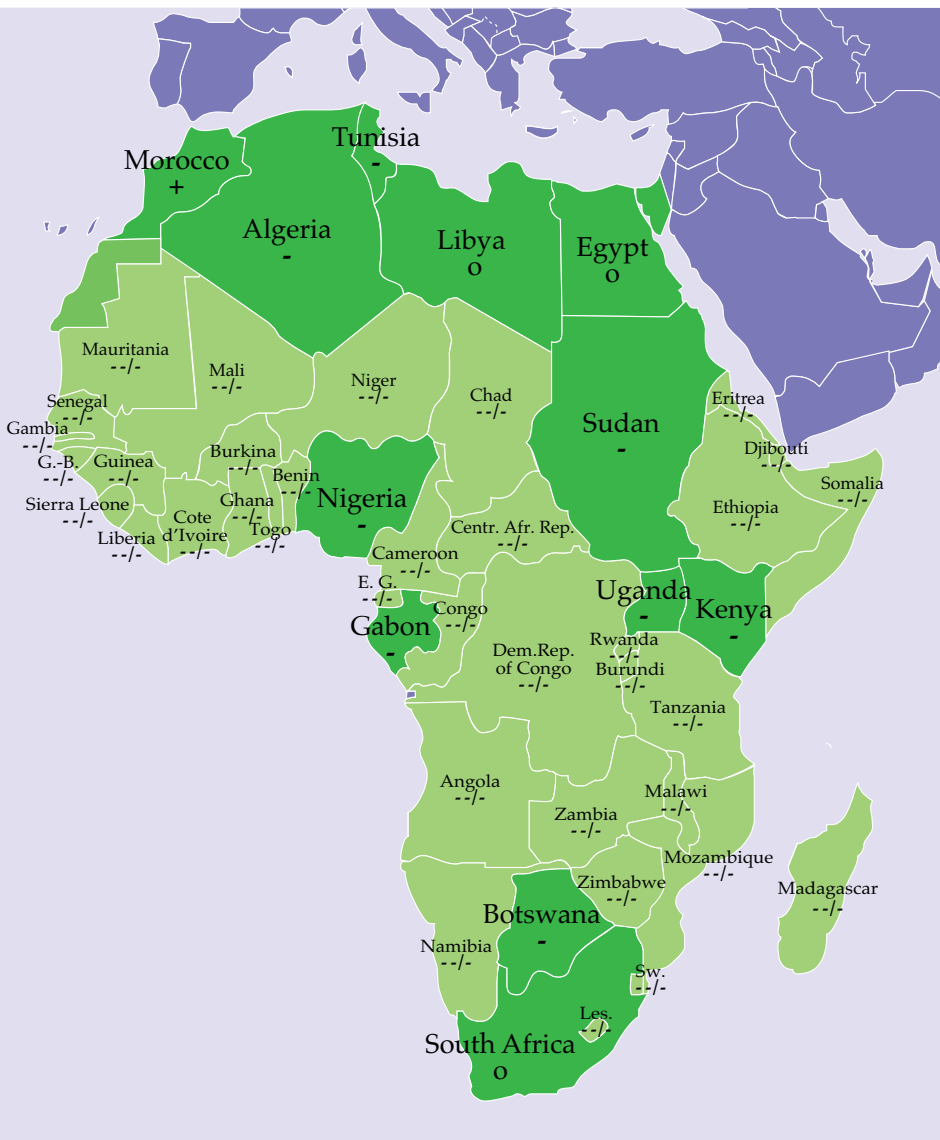
- There are few local coaching initiatives in Africa yet (only in Morocco, South Africa and partly in Uganda, Nigeria and Egypt) which define and develop coaching specifically for their country or region. Coaching is more driven and determined by multinational clients and international coaching, if it exists at all. You rarely find specifically African coaching approaches on the continent at this early stage. General issues are the need for better education

of clients and the challenge to overcome existing cultural barriers.

- Geographically speaking there are huge gaps: coaching features in Northern Africa and in South Africa plus Botswana and in Kenya and Uganda in the East and Nigeria and Gabon in the West, but the rest of the continent is still undiscovered in terms of coaching.
- The use of coach supervision is widely spread in 4 countries. Remarkably, these have a rather “small” coaching industry (10-60 business coaches). In contrast, in South Africa with about 1600 coaches, supervision is not widely used.
- There is a strong directive dimension to coaching in Africa. In 6 countries a directive coaching approach prevails and a non-directive approach predominates in no single country. Also, where it is undecided, it is mainly because there is simply no coaching industry yet. In nearly all countries, it is an issue that clients expect to get advice and direction from (potential) coaches.

1.2 MAIN THEMES

Let us now have a closer look at the key coaching aspects examined in the Global Coaching Survey one-by-one (see next pages).



AFRICA		
++	Agree strongly	-
+	Agree	1
o	Undecided	3
-	Disagree	8
--	Disagree strongly	-
--/-	countries where it is unclear whether it is "disagree" or "strongly disagree"	36
Total		48

a Acceptance and use of coaching

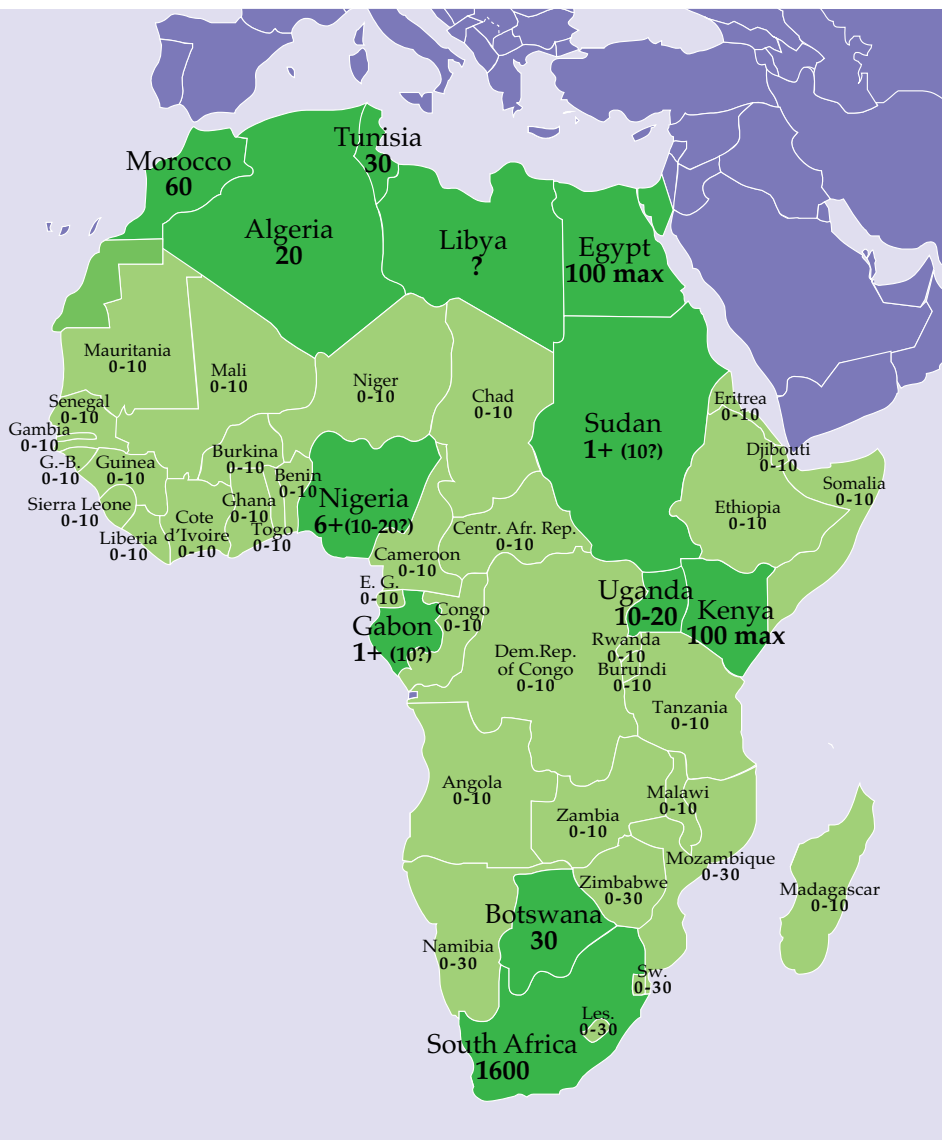
Question asked:

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

Only in Morocco is coaching already widely accepted and used as a business tool. In just another three countries (South Africa, Egypt, Libya) this is undecided.

The 4 countries where the answer was positive or undecided:

Morocco	+
South Africa	o
Egypt	o
Libya	o



AFRICA	
Number of coaches	2000 - 2500
Percentage of coaches worldwide	about 5% (5,2%)
Percentage of world population	14,5%
Density of coaches (1 Coach per number of Inhabitants)	1 : 400.000 - 500.000

The figures in the map generally include all coaches offering business coaching – no matter whether they do this full or part time, with or without being accredited as a coach, as a member of a coaching association or not. Not included in the numbers are generally managers/leaders/consultants just doing their job in a coaching style.

b Number of professional business coaches

Question asked:

How many professional one-to-one business coaches are there in your country?

There are about 2,000-2,500 business coaches operating in Africa.

South Africa – with about 5% of the African population – has around 1600 business coaches comprising about 70% of the total. Approximately 12% of African coaches (260) are based in Egypt, Kenya and Morocco, so the other 44 African countries have the remaining 18% of business coaches on the continent.

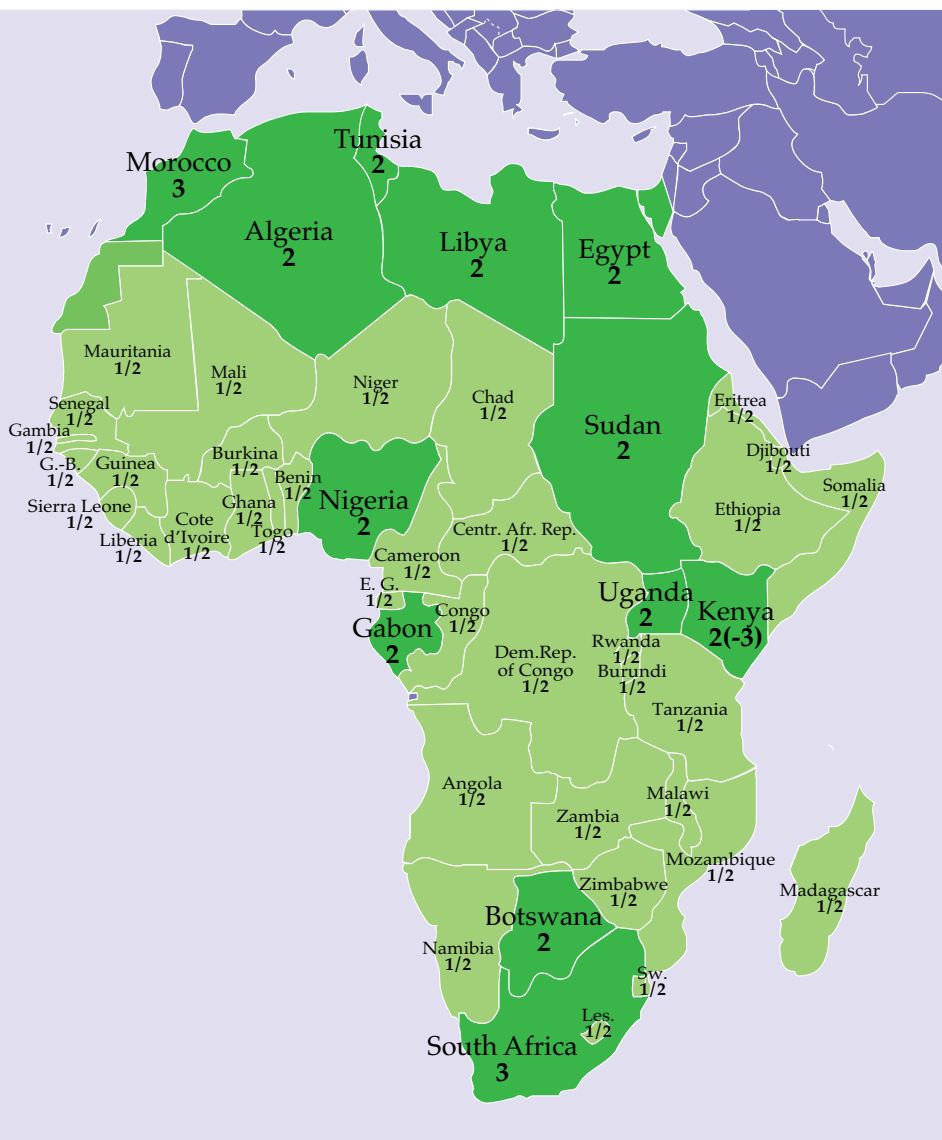
The 6 countries with the highest numbers of business coaches:

1.	South Africa	1,600
2.	Egypt	100 max
3.	Kenya	100 max
4.	Morocco	60
5.	Botswana	30
6.	Tunisia	30

The density of coaches in Africa is 1 coach per 400,000-500,000 inhabitants (without South Africa it would be 1 coach per 1 - 2.3 million inhabitants).

The 6 countries with the highest densities of coaches:

1.	South Africa	1 : 30,000
2.	Botswana	1 : 60,000
3.	Tunisia	1 : 343,000
4.	Kenya	1 : 380,000
5.	Morocco	1 : 520,000
6.	Egypt	1 : 749,000



AFRICA		
1 Pre-introduction	-	36**
2 Introduction	10*	
3 Growth	2	
4 Maturity	-	
5 Decline	-	
6 Relaunch	-	
Total		48

* = one of these is in the late introduction phase 2 (- 3)
 ** = countries either in the pre-introduction phase or maximum in the introduction phase (which one cannot be said with certainty from outside)

c Phase of coaching in its product life cycle

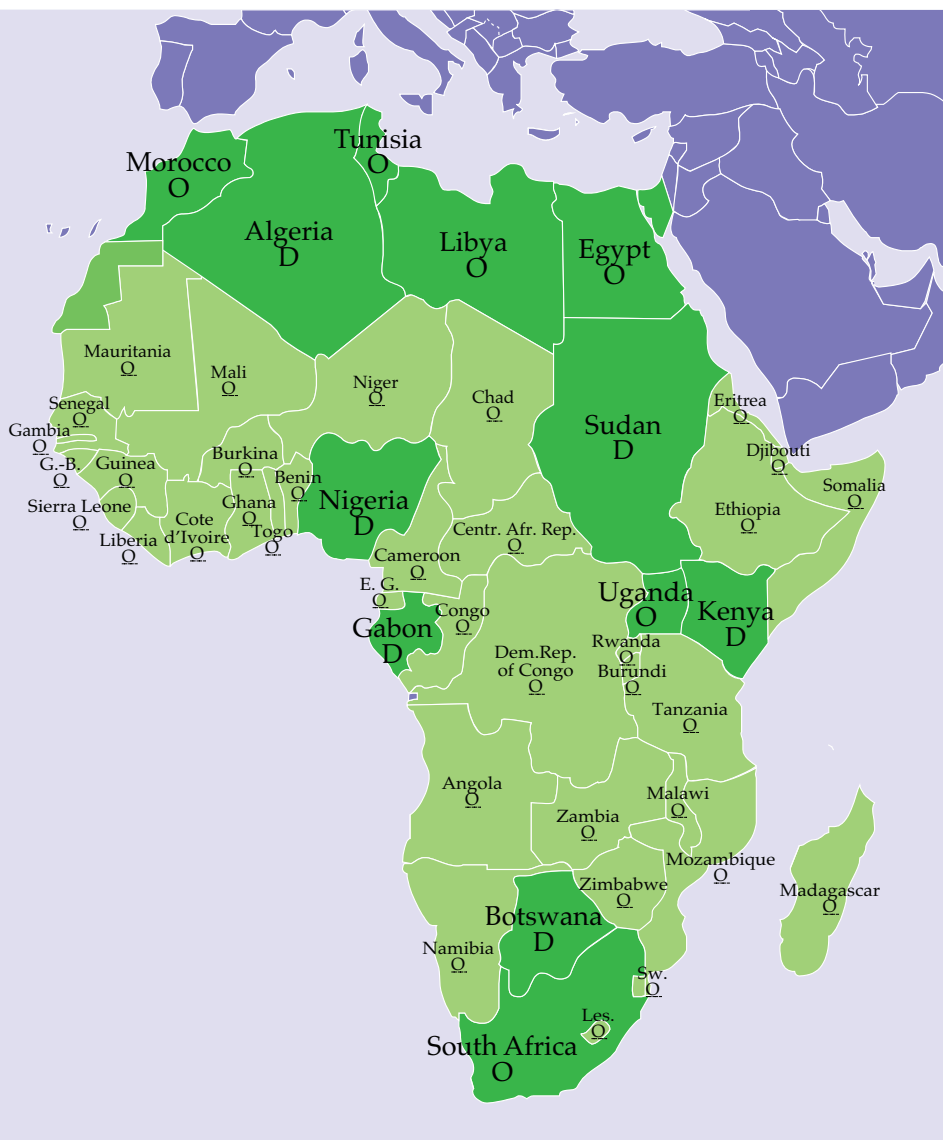
Question asked:

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?

Coaching is still in its infancy in Africa. Only in two countries (Morocco and South Africa) is coaching already in the growth phase, in another 10 countries it is in the introduction phase. In the remaining 36 countries, however, business coaching hasn't yet visibly developed - no coaching industry could be identified here. (also see figure on p. 43)

Countries where coaching is in the late introduction or growth phase:

Morocco	3
South Africa	3
Kenya	2(-3) (Late introduction)



AFRICA		
DD	Highly directive	-
D	Directive	6
Q	Undecided	6
Q	Undecided*	36
N	Non-directive	-
NN	Highly non-directive	-
Total		48

*Q = undecided because there is no visible coaching industry in the country yet, that could be identified from outside

d Directive/non-directive coaching approach

Question asked:

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

There is a strong directive dimension to coaching in Africa. In 6 countries a directive coaching approach prevails and a non-directive approach predominates in no single country. Also, where it is undecided, it is mainly because there is simply no coaching industry yet. In nearly all countries, it is an issue that clients expect to get advice and direction from (potential) coaches.

Countries with a predominantly directive coaching approach:

Algeria

Botswana

Gabon

Kenya

Nigeria

Sudan

e Local characteristics of coaching

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)?

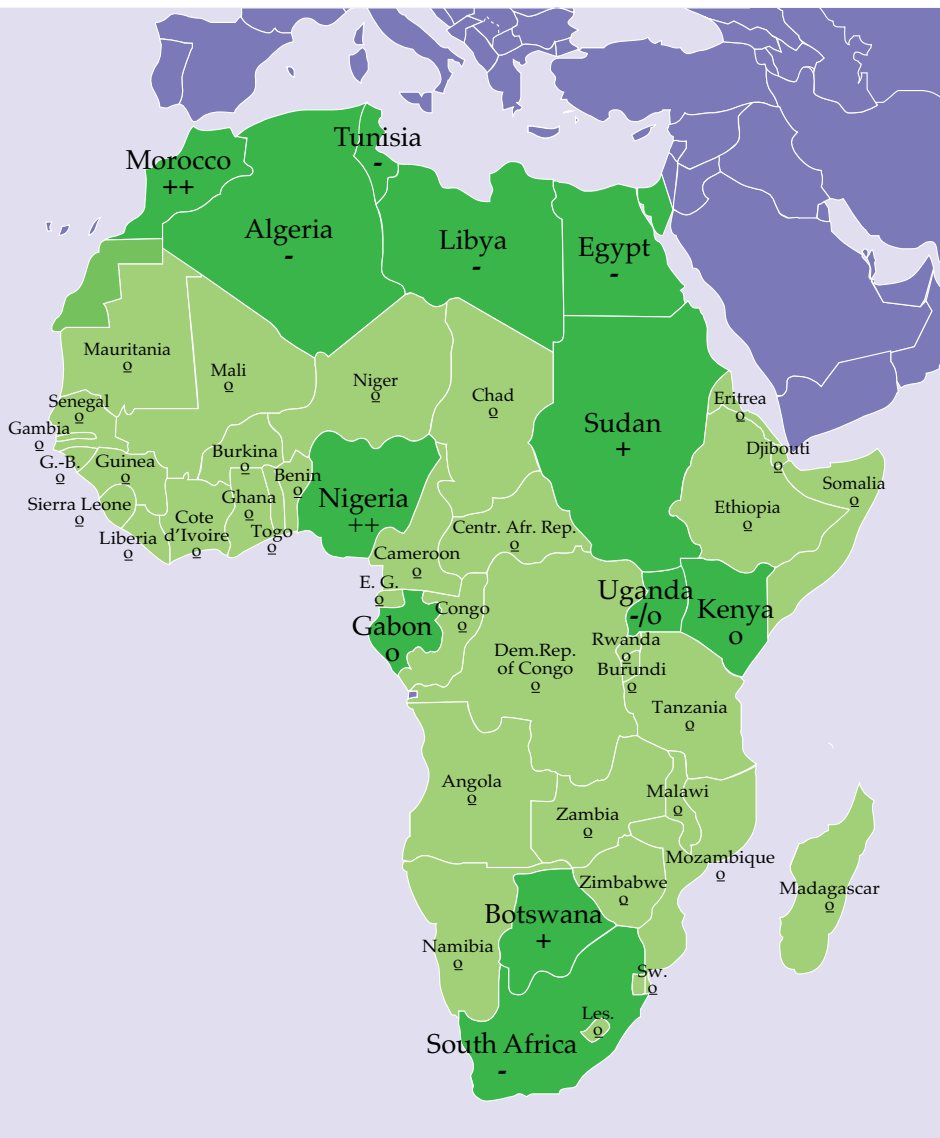
There are few local initiatives in Africa yet (except for the ones in Morocco, South Africa and partly maybe Uganda, Nigeria and Egypt) where real ownership is taken to define and develop coaching specifically for a country. Coaching is mainly driven and determined by multinational clients and international coaching, if it exists at all. Accordingly, you also rarely find specific, typical African coaching approaches on the continent at this early stage. Instead, very generally speaking, we can say that coaching is still largely in its infancy in Africa and overall quite directive. General issues are the need for better education of clients and the challenge to overcome existing cultural barriers.

The following table provides an overview of the answers given in each country (completed by our own findings where needed). It may serve you as a source to look up your specific countries of interest.

Algeria	The coachees expect advice (“recette de cuisine”) and immediate results.
Angola	Business coaching has not yet visibly developed.
Benin	Business coaching has not yet visibly developed.
Botswana	Nothing specific.
Burkina Faso	Business coaching has not yet visibly developed.
Burundi	Business coaching has not yet visibly developed.
Cameroon	Business coaching has not yet visibly developed.
Central African Republic	Business coaching has not yet visibly developed.
Chad	Business coaching has not yet visibly developed.
Congo	Business coaching has not yet visibly developed.
Dem. Rep. of Congo	Business coaching has not yet visibly developed.
Djibouti	Business coaching has not yet visibly developed.
Egypt	Coaching is fairly new. Life coaching is the dominant coaching form so far. No formal coach training takes place except the one given by Persona International and a coaching skills training for managers (as part of their leadership skills). Any educational material offered for coaching comes through the internet, e-learning and/or informal training. The differentiation between different types of coaching is very vague even in the coaches’ minds.
Equatorial Guinea	Business coaching has not yet visibly developed.
Eritrea	Business coaching has not yet visibly developed.

Ethiopia	Business coaching has not yet visibly developed.
Gabon	The market is very limited, and the managers in organisations don't know this service yet, so it is only very little asked for.
Gambia	Business coaching has not yet visibly developed.
Ghana	Coaching in business has not yet visibly developed. (There is one member of an international coaching association, but it is not clear whether and how active this member is in business coaching at all. Several attempts to contact the person remained unanswered.)
Guinea	Business coaching has not yet visibly developed.
Guinea-Bissau	Business coaching has not yet visibly developed.
Ivory Coast	Business coaching has not yet visibly developed.
Kenya	Most clients expect to get instant answers and may not be willing to move from/out of the comfort zone. Most view coaching still as a waste of money.
Lesotho	Business coaching has not yet visibly developed. (Neighbour country is South Africa with 1600 coaches, so maybe a few coaches are also based here.)
Liberia	Business coaching has not yet visibly developed.
Libya	Important aspects to have in mind as a coach are cultural awareness, diversity appreciation and language barriers.
Madagascar	Business coaching has not yet visibly developed.
Malawi	Business coaching has not yet visibly developed.
Mali	Business coaching has not yet visibly developed.
Mauritania	Business coaching has not yet visibly developed.
Morocco	No specific answer given.
Mozambique	Business coaching has not yet visibly developed. (South Africa with 1600 coaches is a neighbour country, so maybe a few coaches are also based here.)
Namibia	Business coaching has not yet visibly developed. (South Africa with 1600 coaches is a neighbour country, so maybe a few coaches are also based here.)
Niger	Business coaching has not yet visibly developed.
Nigeria	Most programmes are not meant for everybody. Only a small, exclusive circle of people enjoy it.
Rwanda	Business coaching has not yet visibly developed.
Senegal	Business coaching has not yet visibly developed.
Sierra Leone	Business coaching has not yet visibly developed.
Somalia	Business coaching has not yet visibly developed.
South Africa	Clients often do not know what to expect. And if they do have expectations, it is that the coach will provide guidance and advice. There is a tendency to say "My coach says...", and "I took your advice about ...", even if the coach didn't say or advise. – It is quite a challenge to have clients own their decisions rather than attributing them to guidance from someone else, regardless of how non-directive the coaching is.

Sudan	<p>Coaching is used in the following areas/ways:</p> <ul style="list-style-type: none"> - Self development - Careers and personnel systems development - Results based management development - Log frames and time management development - IT based development <p>Cultural, tribal and religious factors are still risky factors that can threaten the thriving of coaching.</p>
Swaziland	Business coaching has not yet visibly developed. (Neighbour country is South Africa with 1600 coaches, so maybe a few coaches are also based here.)
Tanzania	Business coaching has not yet visibly developed.
Togo	Business coaching has not yet visibly developed.
Tunisia	<p>Executives are not used to talking about potential weaknesses or areas of development. Getting/Having the position of an executive means that you know more than others and that you're a kind of reference - you have a success story to tell.</p> <p>Top executives often look for coaches from abroad for highest confidentiality or discretion. The local coaching market is very small, and they are afraid of having information or personal aspects spread over Tunis as everyone knows everyone. It doesn't mean that Tunisian coaches are not professional, but clients sometimes feel more secure with a coach from abroad. Hierarchy is highly respected. Coaches need to take this cultural aspect into account, also with regard to the aspect of gender.</p> <p>Coaching is seen as a tool for top executives only, or for a team which has a conflict to solve/manage.</p> <p>Most people don't have access to management training, and are not familiar with the fundamentals of business yet (setting objectives, evaluating performance...), so they are not ready for a coaching approach yet. They are starting to consider evaluating performance, but don't think about potential yet.</p> <p>Most of the Tunisian "coaches" are more advisors or PNL technicians.</p>
Uganda	<p>Coaching is little known in the market. Clients need more explanation on what it is and how a more non-directive approach may apply. There is a tendency for people to expect and ask for answers rather than explore possibilities.</p> <p>Face-to-face coaching is the most preferred mode of interaction compared to telephone and e-coaching.</p> <p>The organisations that have picked up coaching and mentoring as people development interventions are mainly the multinational ones. As they often are trend setters, coaching may have a bright future in Uganda.</p>
Zambia	Business coaching has not yet visibly developed.
Zimbabwe	Business coaching has not yet visibly developed. (South Africa with 1600 coaches is a neighbour country, so maybe a few coaches are also based here.)



AFRICA		
++	Agree strongly	2
+	Agree	2
o	Undecided	3*
o	Undecided**	36
-	Disagree	5
--	Disagree strongly	-
Total		48

* = one of these: disagree to undecided
 **o = undecided because there is no visible coaching industry in the country yet, that could be identified from outside

f Use of supervision by coaches

Question asked:

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

The use of coach supervision is widely spread in 4 countries. Remarkably, these have a rather “small” coaching industry (10-60 business coaches). In contrast, in South Africa with about 1600 coaches, supervision is not widely used.

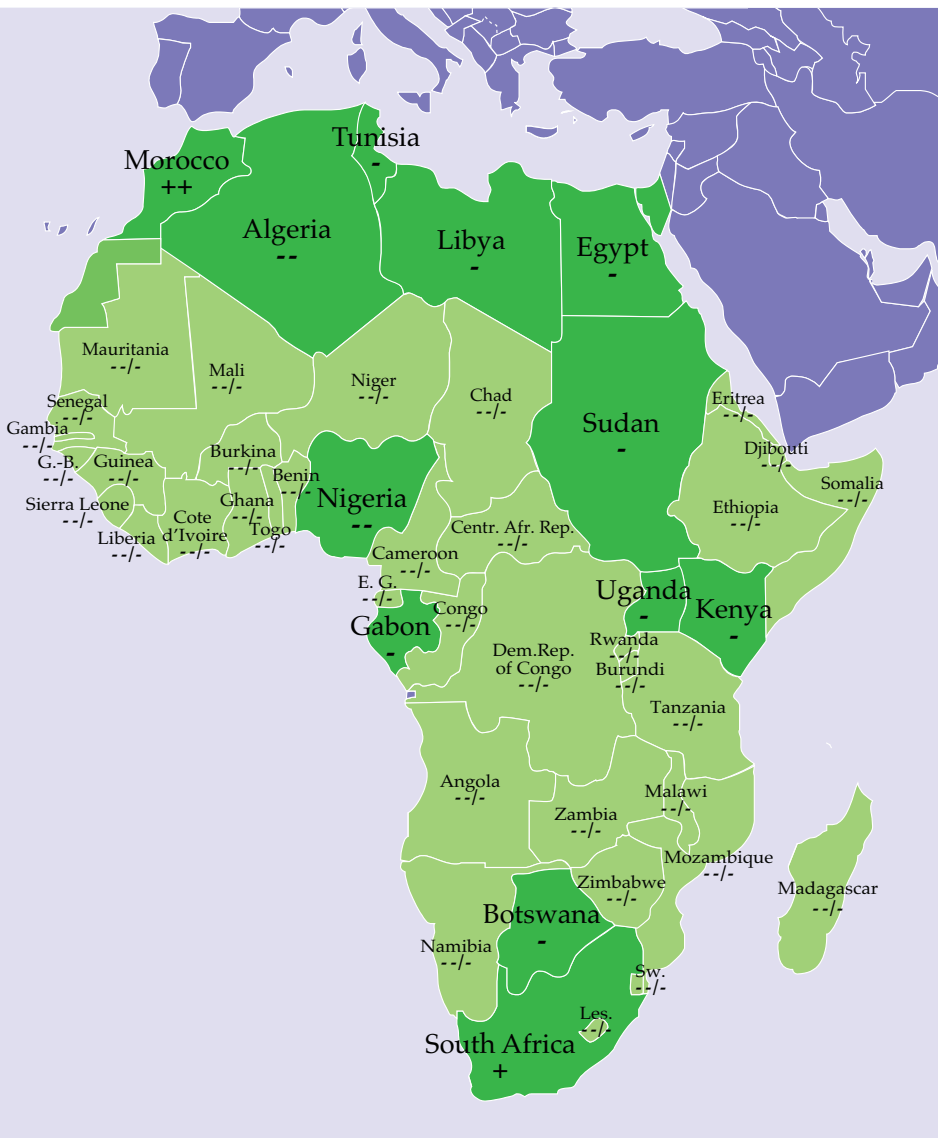
Where supervision is widely spread:

Botswana

Morocco

Nigeria

Sudan



AFRICA		
++	Agree strongly	1
+	Agree	1
o	Undecided	-
-	Disagree	8
--	Disagree strongly	2
--/-	countries where it is unclear whether it is "disagree" or "strongly disagree"	36
Total		48

g Coaching on its way to becoming a real profession

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.)?

Only in Morocco and South Africa, is one-to-one business coaching already far advanced on its way to becoming a real profession. In all other 46 countries, it is not. (In no country, this is undecided.)

National coaching associations have successfully developed in Morocco (Maroc Coaching) and South Africa (COMENSA). Slightly emerging coaching communities may also be found already in Uganda (Coach Africa) and Nigeria (Nigeria Coaches Association). However, the overall situation with regard to professional coaching bodies in Africa (national or international ones) is very poor.

Coaching is far advanced in becoming a real profession in:

Morocco

South Africa

Follow-up question:

“Explain your answer to the previous question”

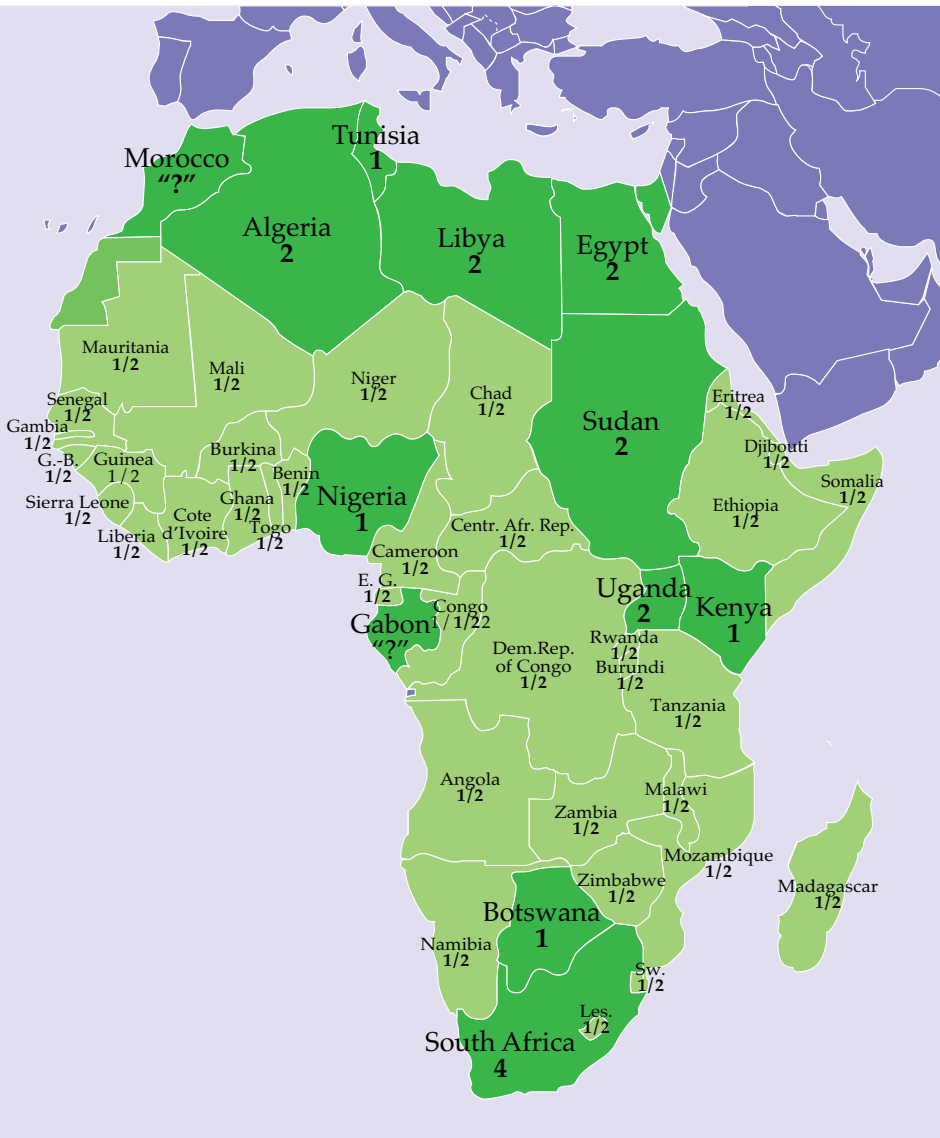
Results:

The following table provides an overview of the answers given in each country (completed by our findings where needed). It may serve you as a source to look up your specific countries of interest.

Algeria	The coaching profession is not organized in any association, so there is no local culture/lobby promoting coaching. The code of ethics is limited to the principle of confidentiality regarding the information of/about the client.
Angola	Business coaching has not yet visibly developed.
Benin	Business coaching has not yet visibly developed.
Botswana	The whole intervention is still in its infancy and has not taken firm roots. In Botswana people tend not to assume responsibility for others, this includes the responsibility to enhance the knowledge of other people or their integration into work. Managers believe that people are hired because they have what the job requires, and therefore they [the managers] are not responsible for enhancing the skills or ability of the employees.
Burkina Faso	Business coaching has not yet visibly developed.
Burundi	Business coaching has not yet visibly developed.
Cameroon	Business coaching has not yet visibly developed.
Central African Republic	Business coaching has not yet visibly developed.
Chad	Business coaching has not yet visibly developed.
Congo	Business coaching has not yet visibly developed.
Dem. Rep. of Congo	Business coaching has not yet visibly developed.
Djibouti	Business coaching has not yet visibly developed.
Egypt	There are not more than a hundred coaches in a 90 million population country – and mostly these coaches neither have a formal training nor any certification. The differentiation between different types of coaching is very vague even in the coaches’ minds. I strongly suggest and advocate the presence of a professional coaching body that provides accreditation and a code of ethics, in order to regulate this trend before it becomes a haphazard profession. (Also see answer to question e. for Egypt.)
Equatorial Guinea	Business coaching has not yet visibly developed.
Eritrea	Business coaching has not yet visibly developed.
Ethiopia	Business coaching has not yet visibly developed.
Gabon	While there is no single company actually specialising on coaching only, the only one(s) which operate in the field are maximum specialized on human resources more generally.

Gambia	Business coaching has not yet visibly developed.
Ghana	Coaching in business has not yet visibly developed (There is one member of an international coaching association, but it is not clear whether and how active this member is in business coaching at all. Several attempts to contact the person remained unanswered.)
Guinea	Business coaching has not yet visibly developed.
Guinea-Bissau	Business coaching has not yet visibly developed.
Cote d'Ivoire	Business coaching has not yet visibly developed.
Kenya	Coaching in Kenya is still in the rudimentary stages, but on its way to being a fully accepted profession. Coaching is now in the late introductory phase. While one-to-one coaching may not be mature, advanced or well grown yet in any way, many people and institutions would/will be more open to coaching, if there was some form of accreditation. Without this, it will look like any other fad job, or as a way to "help disturbed people".
Lesotho	Business coaching has not yet visibly developed. (Neighbour country is South Africa with 1600 coaches, so maybe a few coaches are also based here.)
Liberia	Business coaching has not yet visibly developed.
Libya	No specific answer given.
Madagascar	Business coaching has not yet visibly developed.
Malawi	Business coaching has not yet visibly developed.
Mali	Business coaching has not yet visibly developed.
Mauritania	Business coaching has not yet visibly developed.
Morocco	Coaching is much recommended and demanded. Many coaches have successfully established their coaching practice. [There is a national coaching association called "Maroc Coaching" and an ICF Chapter Morocco.]
Mozambique	Business coaching has not yet visibly developed. (South Africa with 1600 coaches is a neighbour country, so maybe a few coaches are also based here.)
Namibia	Business coaching has not yet visibly developed. (South Africa with 1600 coaches is a neighbour country, so maybe a few coaches are also based here.)
Niger	Business coaching has not yet visibly developed.
Nigeria	Most programmes are not meant for everybody. Only a small, exclusive circle of people enjoy it. [There is no coaching association with formalized structures and accreditation procedures yet.]
Rwanda	Business coaching has not yet visibly developed.
Senegal	Business coaching has not yet visibly developed.
Sierra Leone	Business coaching has not yet visibly developed.
Somalia	Business coaching has not yet visibly developed.

South Africa	<p>It is not “far advanced”, but it is on the way. We have established Comensa (Coaches and Mentors of South Africa, Association), have a code of ethics and membership criteria. We still need to get onto the first rung of the accreditation ladder for coaching institutions.</p> <p>Most coaching takes place in large organisations, which account for a relatively small proportion of businesses in our economy. Coaching is virtually unheard of in smaller businesses. [Besides COMENSA, there are also two ICF Chapters.]</p>
Sudan	<p>Cultural, tribal and religious factors are still risky factors that can threaten the developmental process and thriving of coaching – and hinder the planning of proper capacity building programs that are based on sciences rather than on traditions and sometimes “bad practices”.</p>
Swaziland	<p>Business coaching has not yet visibly developed. (Neighbour country is South Africa with 1600 coaches, so maybe a few coaches are also based here.)</p>
Tanzania	<p>Business coaching has not yet visibly developed.</p>
Togo	<p>Business coaching has not yet visibly developed.</p>
Tunisia	<p>Most coaches in the Tunisian market have no accreditation. But there is one school which delivers training in partnership with a Canadian accredited school. And I’ve met two coaches trained by international coaches.</p> <p>Most of the Tunisian “coaches” are more advisors or PNL technicians.</p>
Uganda	<p>Coach Africa has only just started the process of creating a coach federation to which all coaches may subscribe. We are so far in the process of getting to accreditation level, but at least we know the benefits and are working towards eventually getting an act of parliament to register coaching among the recognized professions in the country.</p> <p>The organisations that have picked up coaching and mentoring as people development interventions are mainly the multinational ones. As they often are trend setters, coaching may have a bright future in Uganda.</p>
Zambia	<p>Business coaching has not yet visibly developed.</p>
Zimbabwe	<p>Business coaching has not yet visibly developed. (South Africa with 1600 coaches is a neighbour country, so maybe a few coaches are also based here.)</p>



AFRICA		
1	not at all	4
1/2*		36
2		5
3		-
4		1
5		-
6		-
7		-
8		-
9		-
10	very much	-
Answer "?"		2
Total		48

*1/2 = either 1 or 2, but very low

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

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)?

The coaching culture concept is almost unknown in Africa. Only in South Africa, and here above all in the context of multinational companies rather than in local companies, is it mentioned. (In Morocco, no specific answer was given, so it is not clear what is the exact situation here.)

1.3. GEOGRAPHICAL AREAS WITHIN AFRICA

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

a. Northern Africa (Algeria, Egypt, Libya, Morocco, Sudan, Tunisia)

In terms of coaching, this part of Africa is one of the two more developed regions of the continent (besides Southern Africa). In all countries coaching is in the introduction phase - except for Morocco where it is already in the growth phase. Morocco is an exceptional country with regard to coaching also in other ways: Coaching is widely accepted and used here and far advanced to becoming a real profession. A Moroccan Coaching Association (Maroc Coaching) exists which seems to be the only existing coaching association headquartered in an Arabian country. Also use of supervision by coaches is high (in the Sudan as well). The number of business coaches in Morocco may be low (only 60), but those who operate have obviously managed to establish their coaching practice successfully and work at a high professional level.

Besides Morocco, coaching is not yet widely accepted and used in any other Northern African country or far advanced on its way to becoming a real profession. The numbers of business coaches are generally low in Northern Africa, and the concept of coaching cultures is not known yet.

The coaching style tends to slant towards being directive - you don't find any country with a predominantly non-directive coaching approach (which is true for the whole of Africa).

b. Southern Africa (Botswana, Lesotho, Namibia, South Africa, Swaziland)

There is a clear divide in the development of coaching when comparing South Africa and the rest of the Southern region. South Africa has a well developed, growing coaching market with about 1600 business coaches (around 70% of all African business coaches), and coaching is far advanced to becoming a real profession (e.g. existence of a national coach-

ing association: COMENSA - Coaches and Mentors of South Africa). In the other countries few coaches are operating and it is difficult to identify any visible coaching market there at all. Only in Botswana, is coaching clearly in the introduction phase (30 coaches, many making use of supervision).

Interestingly, in no country - not even in South Africa (where this question is undecided) - is coaching already widely accepted and used as a business tool. It is worth mentioning that South Africa is the only African country where the coaching culture concept is at least quite well known and used (it is talked about by the multinational companies, but rarely, if at all, by local companies).

c. Western, Middle and Eastern Africa (37 countries, e.g. Ghana, Nigeria, Cameroon, Gabon, Kenya, Uganda)

These regions are largely a blank, undiscovered area of coaching. Business coaching has visibly developed in hardly any of the countries. In none of the countries, is coaching widely accepted and used as a business tool or far advanced to becoming a real profession.

In just 4 countries we know coaching has started to emerge:

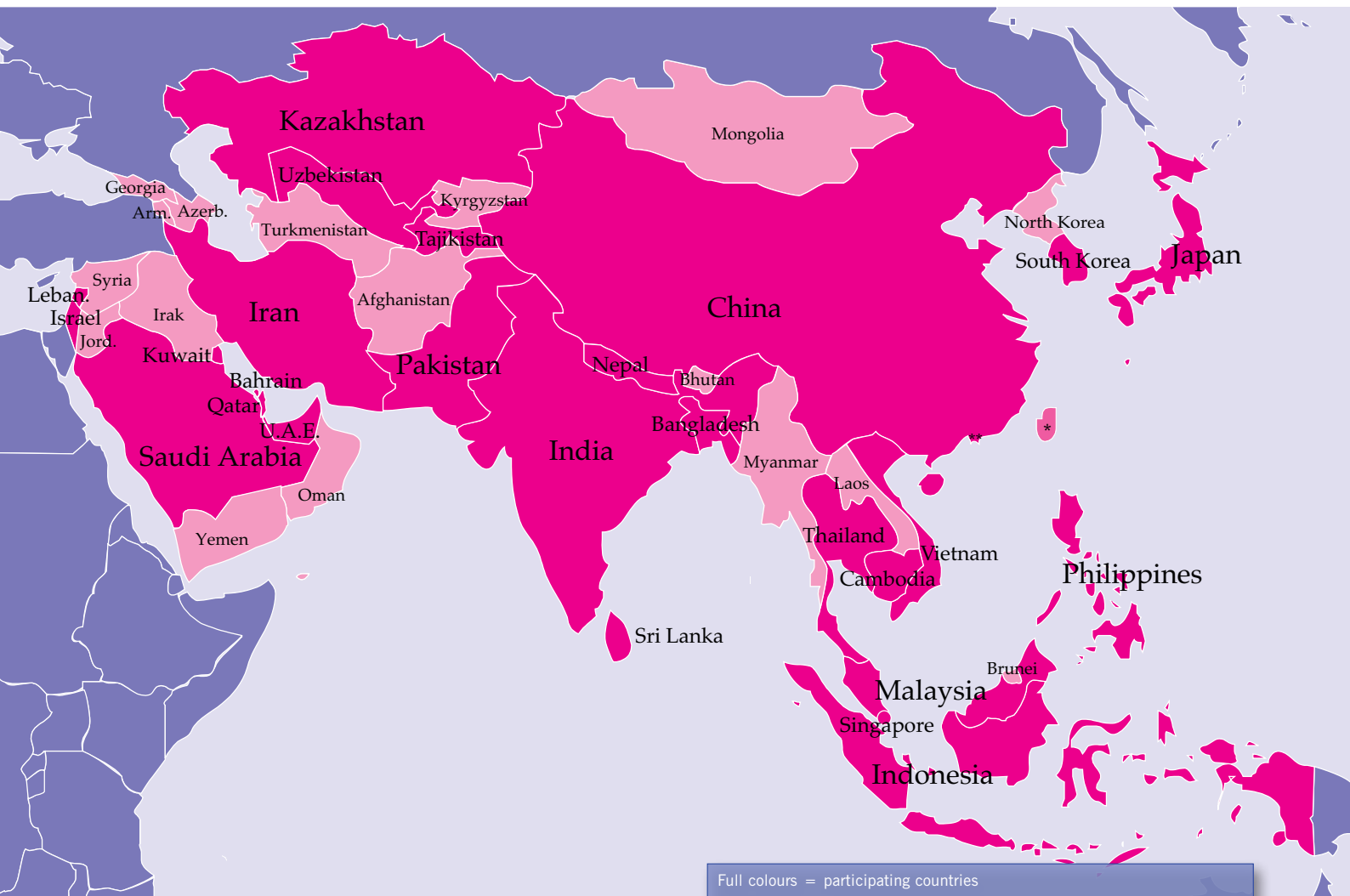
Kenya may be seen as the leading one here with up to 100 business coaches and a coaching market being in the late introduction phase.

Nigeria and Uganda comprising each about 10-20 business coaches are in the introduction phase and show a high level of professionalism by those who act in the field. Coaching is mainly for a small circle of people only - and is mostly driven by multinationals (which seems to be true for most coaching in Africa). There are small emerging coaching communities in both countries that may develop into real coaching associations in the future. Business coaches in Nigeria make use of supervision.

Coaching in Gabon is just in the early introduction phase, but at least coaching is starting to take place in a visible way (e.g. one business coach is officially listed in the national business register).

Generally, where coaches operate in the region, the predominant coaching style is more directive. The coaching culture concept is not or only very rarely known in the area.

2 . A S I A



Full colours = participating countries
Light colours = additionally researched countries

* = Chinese Taipei/ Taiwanese market (under the de facto control of the ROC government, claimed in whole by the PRC) / ** = China, Hong Kong (SAR)

ASIA

42 covered countries (in alphabetical order):

Afghanistan	Iran	Nepal	Thailand
Armenia	Israel	North Korea	Turkmenistan
Azerbaijan	Japan	Oman	United Arab Emirates
Bahrain	Jordan	Pakistan	Uzbekistan
Bangladesh	Kazakhstan	Philippines	Vietnam
Bhutan	Kuwait	Qatar	Yemen
Brunei	Kyrgyzstan	Saudi Arabia	
Cambodia	Laos	Singapore	
China	Lebanon	South Korea	
Georgia	Malaysia	Sri Lanka	
India	Mongolia	Syria	
Indonesia	Myanmar	Tajikistan	

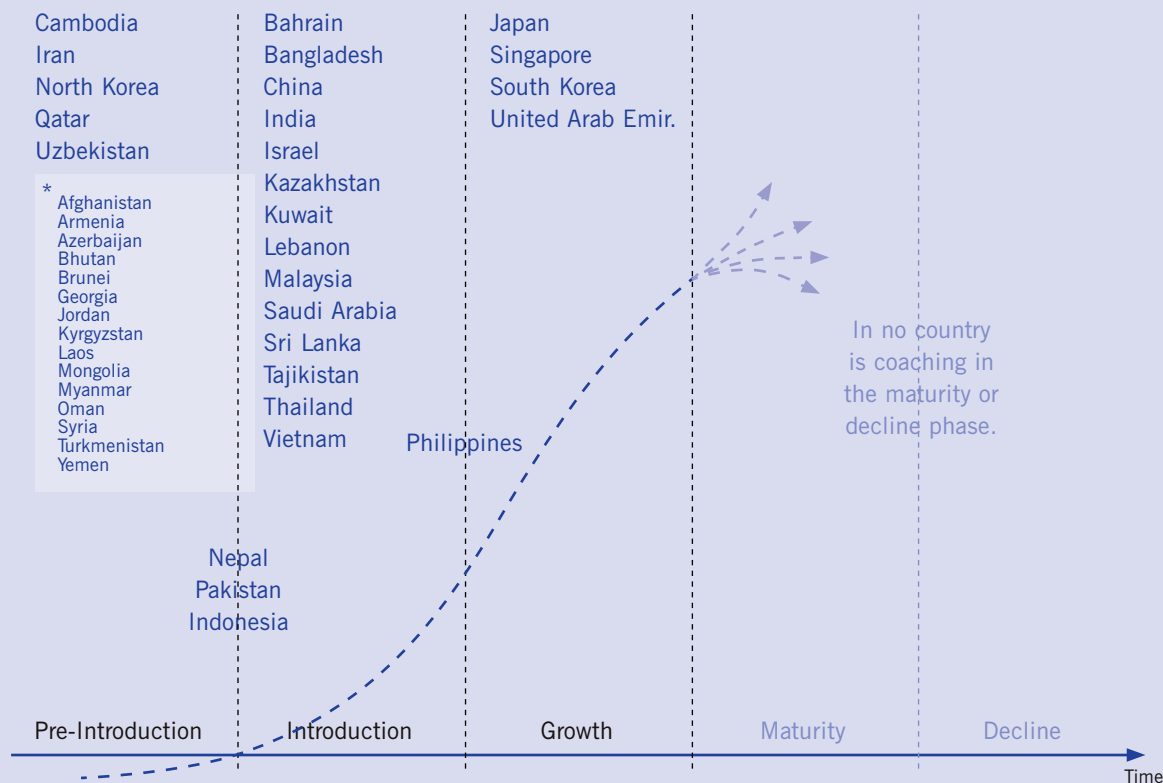


Figure: Current product-life-cycle stage of coaching in Asia

* = countries in the pre-introduction phase and possibly early introduction

2.1 OVERVIEW

There are about 4,300 - 4,700 business coaches operating in Asia.

Japan und South Korea – with about 4% of the Asian population – have around 2,500 business coaches comprising about 55% of all Asian coaches. Another 10% of coaches are based in the region of Singapore, Malaysia and the Philippines.

The density of coaches is 1 coach per 900,000 inhabitants in Asia (without Japan it would be 1 coach per 1.4 - 1.6 million inhabitants).

In general, Eastern and South-eastern Asia may be regarded as the two largest and most dynamic coaching regions. There are major coaching activities in only a few other countries (e.g. United Arab Emirates, Israel, India). Apart from these, however, coaching is still in its infancy (if at all) in Asia.

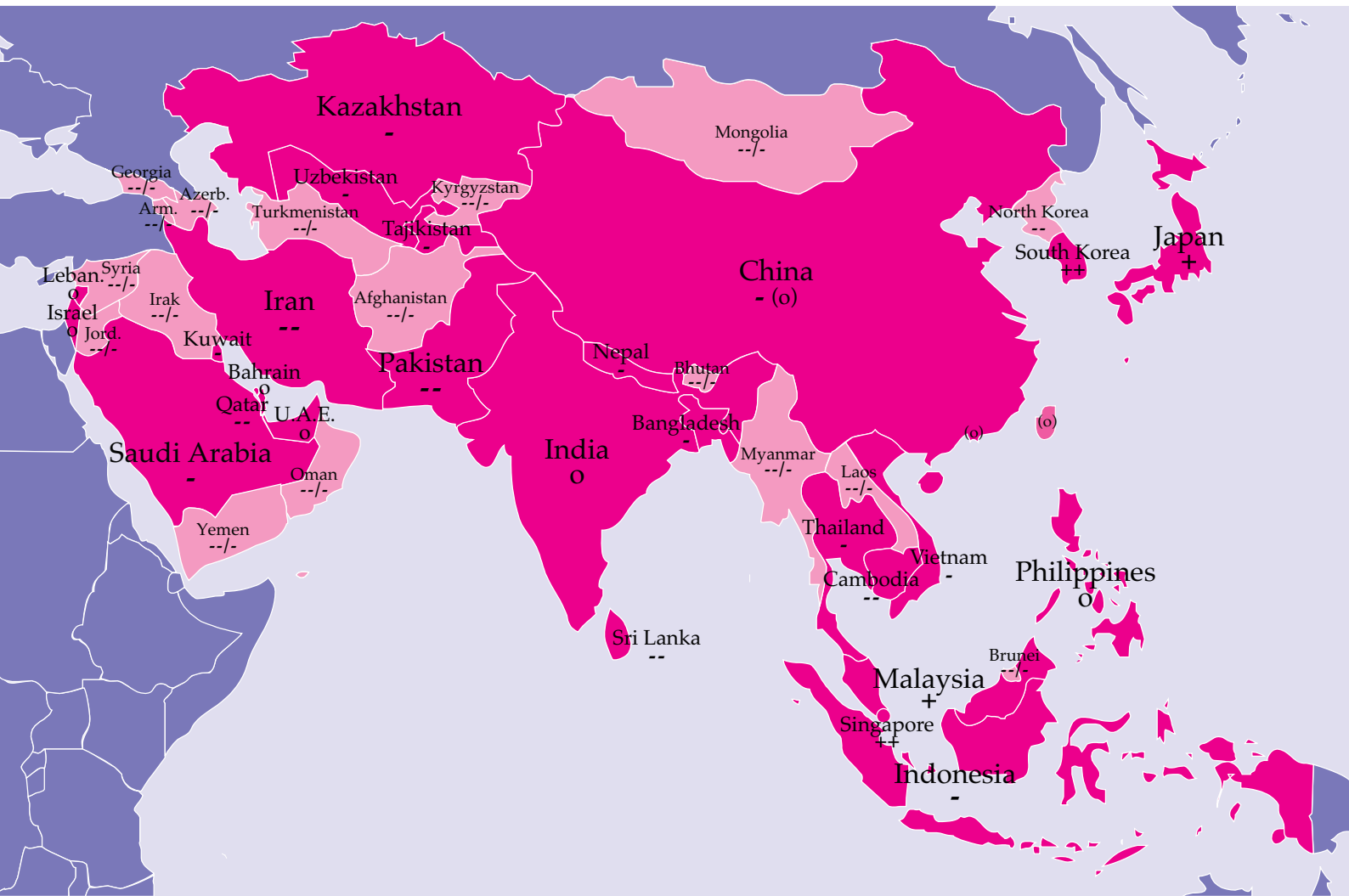
The following findings illustrate this further:

- In Japan, Malaysia, Singapore and South Korea, coaching is widely accepted and used as a business tool. In 32 countries (about 75%), it is not. In another six countries this is undecided (India, United Arab Emirates, Israel, Philippines, Lebanon, Bahrain).
- In Japan and South Korea, one-to-one business coaching is well advanced towards a profession. In 37 countries, it is not. Only in 3 countries, this is undecided. There is a tendency in Asia to see and develop coaching more as a service rather than as a profession.
- In 5 countries (Japan, Singapore, South Korea, United Arab Emirates and the Philippines) coaching is in the growth phase, in another 17 countries it is in the introduction phase. In the remaining 20 countries, however, business coaching hasn't yet visibly developed – no coaching industry could be identified. (see figure above)
- There is no prevailing coaching style in Asia. However, there is a slight slant towards directive coaching: 13 countries claim directive as the dominant style (in Bangladesh and Pakistan coaching is highly directive), whereas 6 countries claim non-directive coaching as the predominant style. In 23 countries, this is undecided. So there is not the Asian approach. Depending on each country, there are many different local characteristics and preferences in the way coaching is understood and delivered.

- In three countries (Japan, Philippines, Malaysia), the coaching culture concept is already well known and used. In another five countries (China, India, Israel, Saudi-Arabia, United Arab Emirates) this is partially the case.
- International coaching associations are quite active in Asia and contribute to the development of coaching there. At the same time, a number of local coaching initiatives have already emerged in Asia and have started to define and develop coaching specifically for the respective region or country. National or regional coaching bodies partly exist or are starting to emerge and be formalized. Also a first international (i.e. Asia Pacific) coaching association in the region has been set up. So coaching is clearly on the rise and in the process of becoming more mature in Asia in terms of quality and infrastructure.
- However, coaching is still mainly driven and determined by multinational clients or international coaching. As a result, you rarely find specific Asian coaching forms and approaches. So while local initiatives increasingly take place in Asia, these still remain rather limited.

2.2. MAIN THEMES

Let us now have a closer look at the key coaching aspects examined in the Global Coaching Survey one-by-one (see next pages).



a Acceptance and use of coaching

Question asked:

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

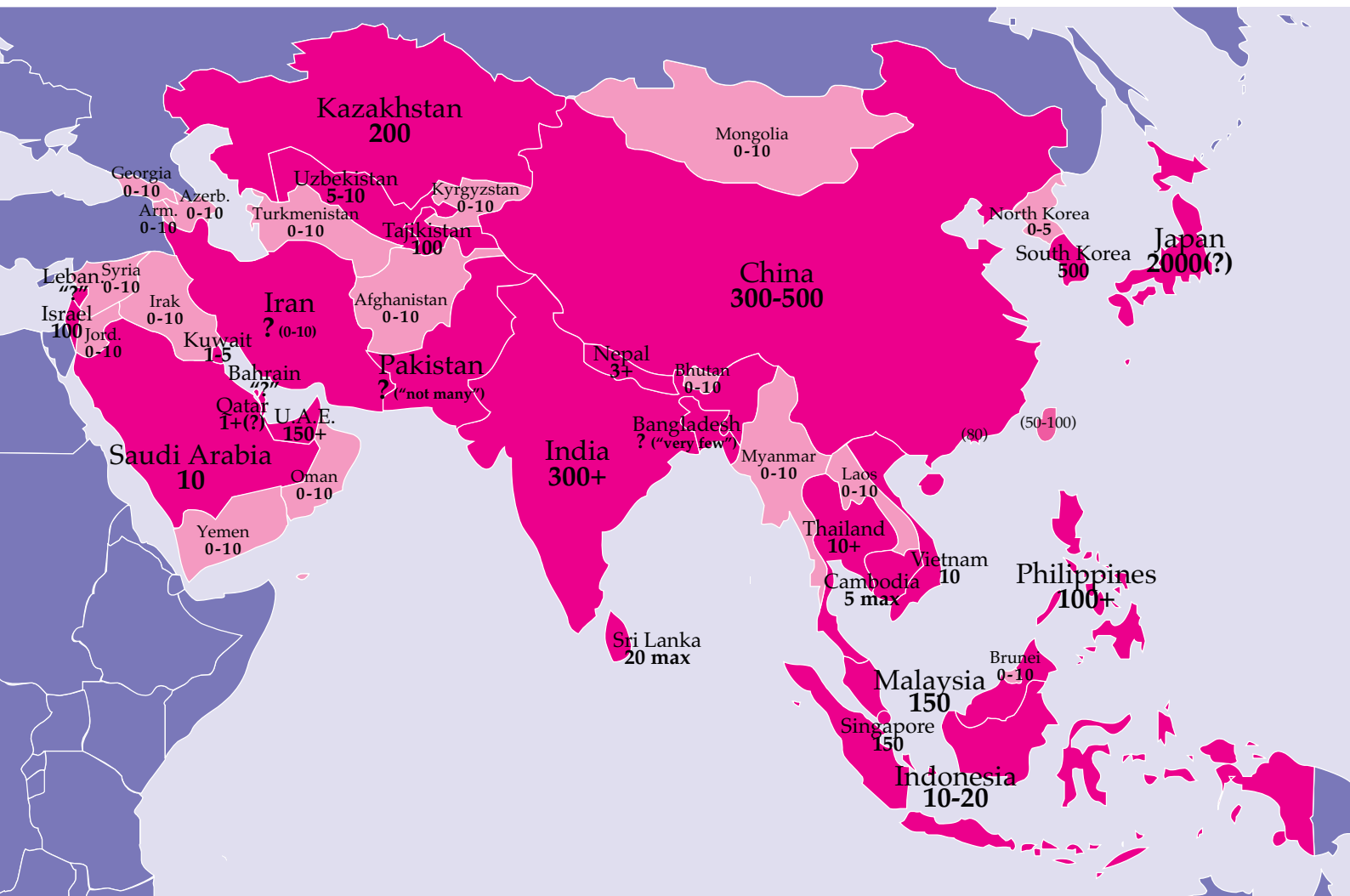
In Japan, Malaysia, Singapore and South Korea, coaching is widely accepted and used as a business tool. In 32 countries (about 75%), it is not. In another six countries this is undecided (India, United Arab Emirates, Israel, Philippines, Lebanon, Bahrain).

The 4 countries where the answer was positive:

- Japan
- Malaysia
- Singapore
- South Korea

ASIA		
++	Agree strongly	2
+	Agree	2
o	Undecided	6
-	Disagree	11*
--	Disagree strongly	6
--/-	countries where it is unclear whether it is "disagree" or "strongly disagree"	15
Total		42

* = one of these is disagree overall, but partly undecided = - (o)



b Number of professional business coaches

Question asked:

How many professional one-to-one business coaches are there in your country?

There are about 4,300-4,700 business coaches operating in Asia.

Japan und South Korea – with about 4% of the Asian population – have around 2,500 business coaches comprising about 55% of all Asian coaches. Another 10% of coaches are based in the region of Singapore, Malaysia and the Philippines.

Eastern and Southeastern Asia are thus the two largest and most dynamic coaching regions in Asia.

ASIA	
Number of coaches	4300 - 4700
Percentage of coaches worldwide	about 10% (10,3%)
Percentage of world population	59%
Density of coaches (1 Coach per number of inhabitants)	1 : 900.000

The figures in the map generally include all coaches offering business coaching – no matter whether they do this full or part time, with or without being accredited as a coach, as a member of a coaching association or not. Not included in the numbers are generally managers/leaders/consultants just doing their job in a coaching style.

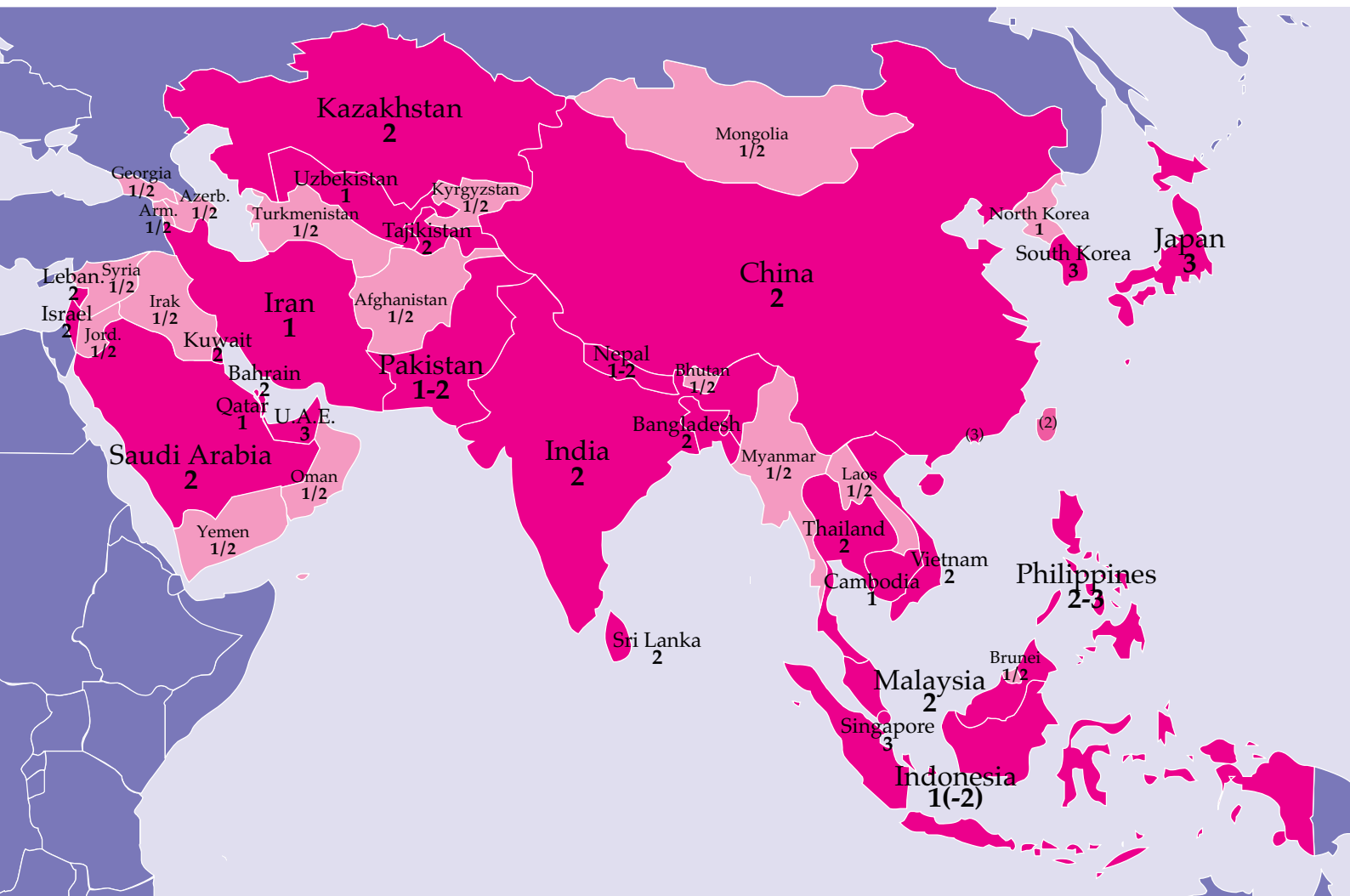
Countries with the highest numbers of business coaches (100 coaches or more):

1. Japan	2,000 (?)
2. South Korea	500
3. China	300 - 500
4. India	300+
5. Kazakhstan	200
6. United Arab Emirates	150+
7. Malaysia	150
8. Singapore	150
9. Philippines	100+
10. Israel	100
11. Tajikistan	100

The density of coaches is 1 coach per 900,000 inhabitants in Asia (without Japan it would be 1 coach per 1.4-1.6 million inhabitants).

Countries with the highest densities of coaches:

1. United Arab Emirates	1 : 30,000
2. Singapore	1 : 32,000
3. Japan	1 : 63,000
4. Tajikistan	1 : 73,000
5. Israel	1 : 75,000
6. Kazakhstan	1 : 78,000
7. South Korea	1 : 97,000
8. Malaysia	1 : 185,000
...	
(China)	1 : 2,5 - 4,5 m
	(Hong Kong: 1 : 88,000)
(India)	1 : 3,8 m



C Phase of coaching in its product life cycle

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?

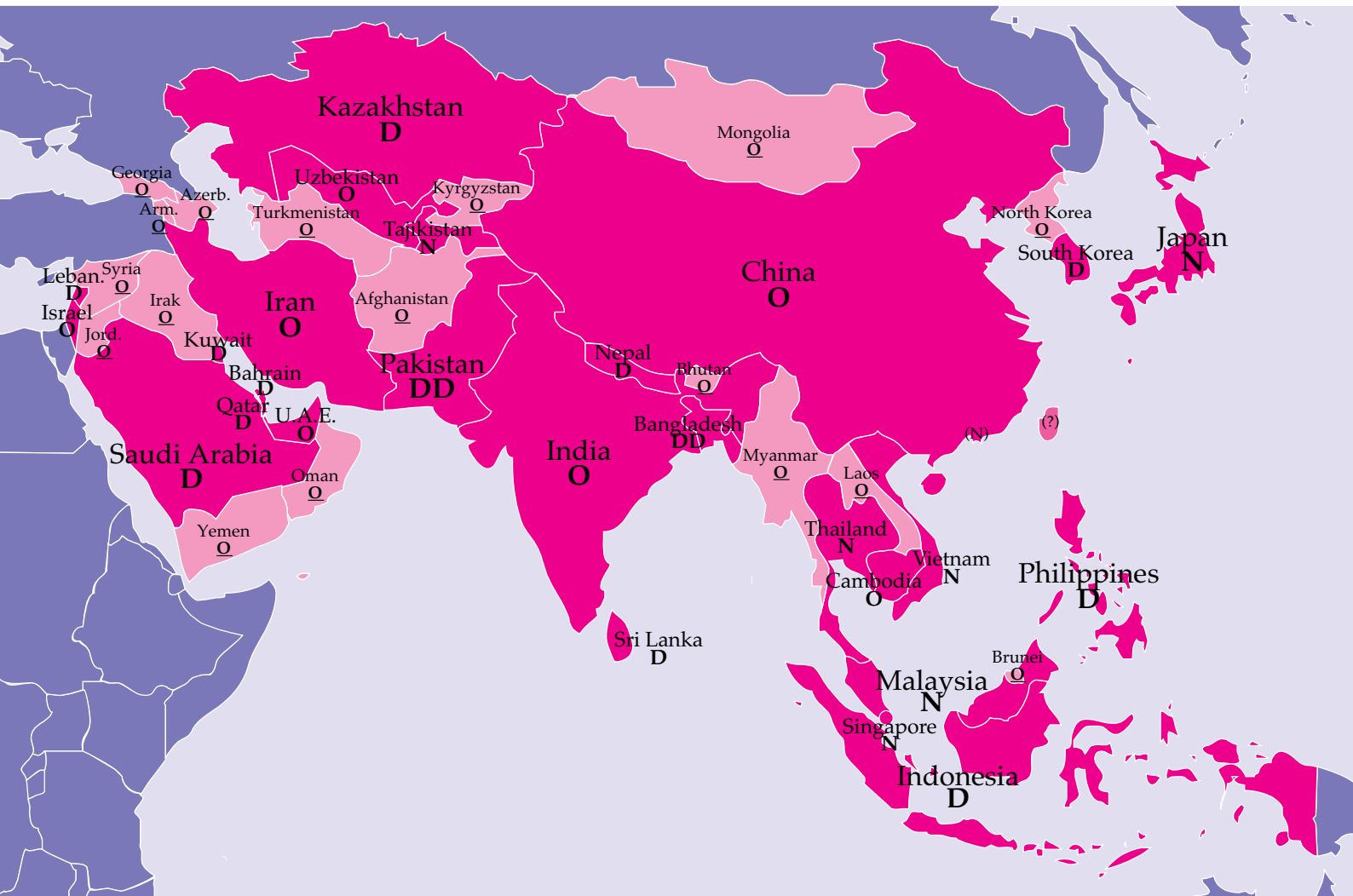
ASIA		
1 Pre-introduction	5	15**
2 Introduction	17*	
3 Growth	5***	
4 Maturity	-	
5 Decline	-	
6 Relaunch	-	
Total	42	

* = three of these are in between pre-introduction and introduction (1-2)
 ** = countries either in the pre-introduction phase or maximum in the introduction phase (which one cannot be said with certainty from outside)
 *** = one of these is in between introduction and growth (2-3)

In 5 countries (Japan, Singapore, South Korea, United Arab Emirates and the Philippines) coaching is in the growth phase, in another 17 countries it is in the introduction phase. In the remaining 20 countries, however, business coaching hasn't yet visibly developed – no coaching industry could be identified. (also see figure on p. 62)

Countries where coaching is in the late introduction or growth phase:

Japan	3
Singapore	3
South Korea	3
United Arab Emirates	3
Philippines	2 - 3



d Directive /non-directive coaching approach

Question asked:

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

There is no prevailing coaching style in Asia. However, there is a slight slant towards directive coaching: 13 countries claim directive as the dominant style (in Bangladesh and Pakistan coaching is highly directive), whereas 6 countries claim non-directive coaching as the predominant style (Japan, Malaysia, Singapore, Tajikistan, Thailand, Vietnam). In 23 countries, this is undecided.

ASIA		
DD	Highly directive	2
D	Directive	11
O	Undecided	7
?	Undecided*	16
N	Non-directive	6
NN	Highly non-directive	-
Total		42

*O = undecided because there is no visible coaching industry in the country yet, that could be identified from outside

e Local characteristics of coaching

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)?

There is definitely not the Asian approach. Depending on each country, there are many different local characteristics and preferences in the way coaching is understood and delivered – also within each region. So diversity prevails. However, there is a visible, general slant towards more directive coaching in Asia, in particular when compared with other continents.

International coaching associations are quite active in Asia and contribute to the development of coaching there. At the same time, a number of local coaching initiatives have already emerged in Asia and have started to define and develop coaching specifically for the respective region or country. National or regional coaching bodies partly exist or are starting to emerge and be formalized. A first international (i.e. Asia Pacific) coaching association in the region (APAC) has been set up. So coaching is clearly on the rise and in the process of becoming more mature in Asia in terms of quality and infrastructure.

However, coaching is still mainly driven and determined by multinational clients or international coaching. As a result, you rarely find specific Asian coaching forms and approaches. So while local initiatives increasingly take place in Asia, these still remain rather limited.

The following table provides an overview of the answers given in each country (completed by our own findings where needed). It may serve you as a source to look up your specific countries of interest.

Afghanistan	Business coaching has not yet visibly developed.
Armenia	Business coaching has not yet visibly developed.
Azerbaijan	Business coaching has not yet visibly developed.
Bahrain	Coaching as a concept is not well developed here yet. This may partly also be because of the local, rather limited approach to developing managers. It is the international companies represented in Bahrain that provide more opportunities for coaching. (Coaching is much better developed for example in Dubai than here in Bahrain.) And with the global downturn, the concept will be even more difficult to sell. So this is a difficult marketplace to work in as a coach. Coaching assignments mainly come from existing contacts, and work with international organisations. At a local level there is also some activity.
Bangladesh	Mostly, the clients (coachee and/or HR) might expect that the coach would give all the solutions. Hardly any distinction is made between coaching, training, consulting and mentoring. [An interesting “coaching form” has emerged in Bangladesh: numerous so-called “coaching centres” for students exist to support their learning at university. While not business coaching, this might lay and be a foundation for more business coaching in the country in the future.]
Bhutan	Business coaching has not yet visibly developed.

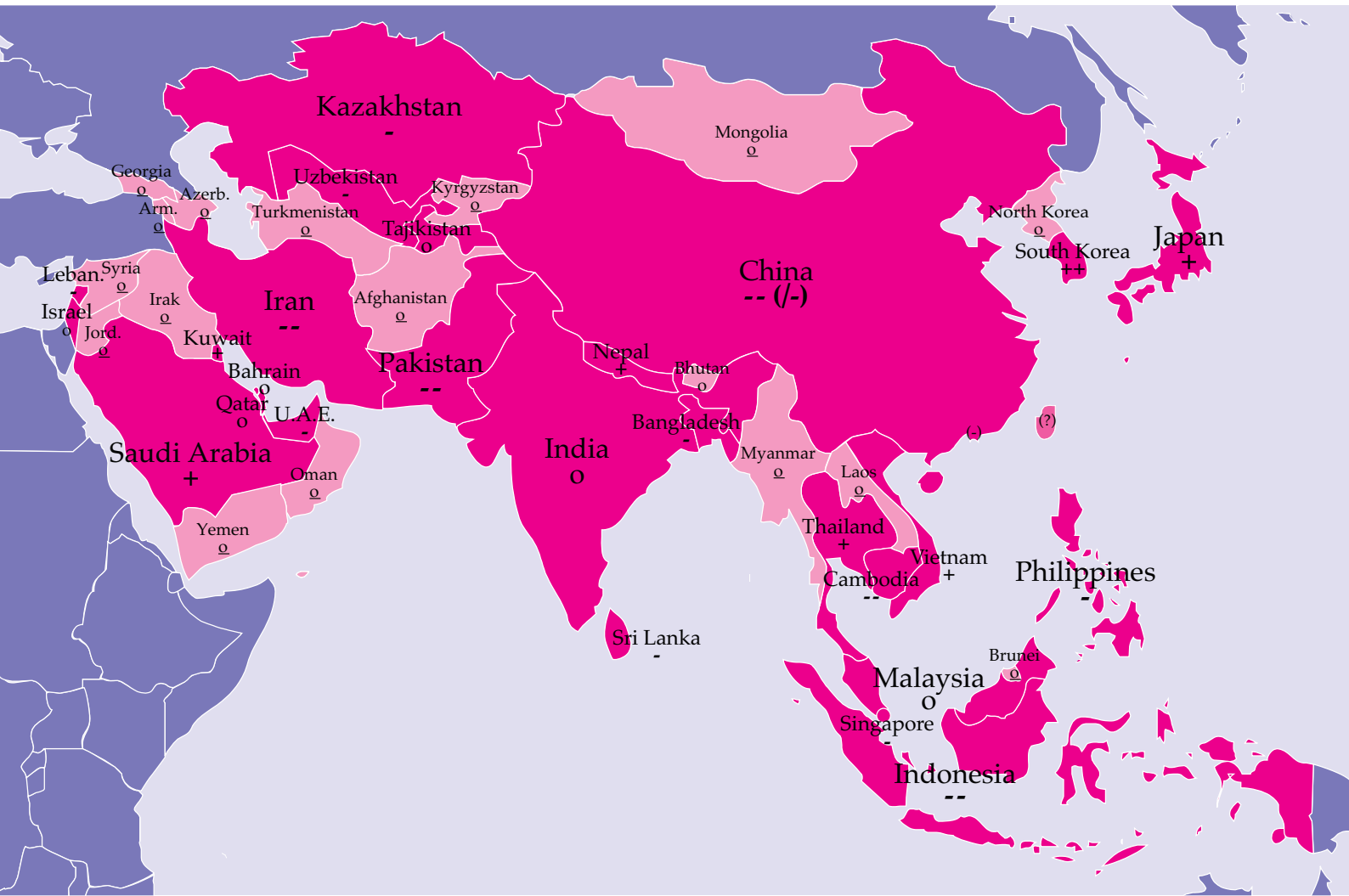
Brunei	Business coaching has not yet visibly developed.
Cambodia	<p>Training and development functions within organizations in Cambodia are still relatively undeveloped. Training is generally purchased based on a course program and the price, rather than as a process which involves needs analysis and alignment with business objectives. As a result, there are no professional coaches operating regularly in Cambodia.</p> <p>Businesses are generally resistant to invest in coaching also due to high turnover rates and a competitive job market. Additionally, with the global economic slowdown, many organizations have drastically reduced training and development budgets, preferring to focus training investments on group trainings rather than initiatives supporting individuals.</p>
China	<p>Coaching in China must have its own original theories, and not just fully copied from the West, as Chinese Culture is very rich, abundant and already with some ideas of coaching embedded. At the same time, the still considerable influence from confucianism may sometimes be not conducive to coaching. The idea that the coach doesn't have the answers but the coachee, is still somewhat strange to many people. However, through careful 'coaching on coaching', coachees tend to get it and then the process can work equally well as anywhere else in the world. [Further traditional, cultural aspects like the principle of "saving face" and the importance of relationships also need to be kept in mind.]</p> <p>There are clear differences concerning the situation and development of coaching in different regions of China: There is a major difference between Mainland China and Hong Kong. Within Mainland China, larger cities and regions with stronger international, economic activities seem more advanced in applying coaching than others.</p> <p>Whether coaching is more directive or non-directive (i.e. whether coaches give advice or not), highly depends on the region and in particular the knowledge and academic background of the clients. As people generally have better education in Hong Kong, this is leading to a more non-directive coaching style there. About 80-90% of the time are used for the mind-set breakthrough and only 10-20% in giving a minimum of advice.</p> <p>In Shanghai, you find the same situation as in Hong Kong, as far as senior executives in multinational companies or in mature, famous, big local enterprises are concerned.</p> <p>However, many people who want to learn coaching skills or being coached are also entrepreneurs of small and medium sized enterprises located in the small towns around Shanghai. Their education level is normally lower, but they have a strong willingness to learn more to sustain their competitiveness. For these, coaches may use 70% of the time to give advice (more consulting) and only 30% focusing on mind-set and emotion.</p> <p>The majority of coaches are overseas coaches living in China. Local Chinese working as full time coaches with the capability to offer one-to-one business coaching are few.</p> <p>Coach supervision is rarely used: People rather tend to think they may copy all things from the senior coaches at the beginning - and then start their own business. Once they have started their own business, they seldom employ the senior coaches to support their continuous learning in the following through supervision.</p> <p>[Also, it may be interesting to note that the coaching culture concept is very differently known and used throughout China. While it is, for example, well accepted and applied in Hong Kong, it is rarely known, if at all, in the Beijing area.]</p> <hr/> <p>Chinese Taipeh/Taiwan (under the de facto control of the ROC government, claimed in whole by the PRC)</p> <p>In the Taiwanese coaching market, coaching is in the introduction phase. There are around 50 - 100 coaches. Interestingly, many of the coaches do not classify between business and life coaching that clearly.</p>

Georgia	Business coaching has not yet visibly developed.
India	<p>Coaching is in its infancy in India. And Indian coaches often still do not know how to really make business with coaching. Certification may be an essential point to achieve this. There are 300+ business coaches in India, but from these just about 20 are full time business coaches specializing in the profit sector. There is a large number of outside coaches coming and doing coaching in India (their number may be around 45-50 across the country). And most of the IT and multinational companies hire coaches from Europe, USA and Australia. Coaching in India is first a way of life, then a way of profession, lastly to be a business proposition. Coaching is above all about how to be a human being, and coaching principles are to take predominance over coaching models and frameworks. From this perspective, any coach needs to master the thinking process and understand law of attraction and how to work from the inside out. This is even not common among many of the greatest, accredited coaches. Still, for most of them it is dollar and coloured paper business, rather than understanding how the principles of coaching are great to make one a great human being before coaching the clients.</p> <p>In India telling others about one's dilemmas and problems is not a major issue. People talk quite a lot with friends, colleagues and family members. However, a majority of the people do not have a goal-centred approach with systematic planning and strategic thinking, working on weekly/fortnightly/monthly goals. Most organizations tend not to have a goal-based, results-oriented culture.</p> <p>India is a country with multi-languages, each state having its own language - especially in South India. The American and British accent is quite difficult for many Indians to follow. The coaching principles have to be placed within the specific contexts and languages. For an outsider it is very difficult to understand these local contexts and the existing local dilemmas and situations.</p>
Indonesia	Some professionals working as consultants, counsellors, mentors, therapists and trainers call themselves "coaches". There is still low awareness of professional coaching, especially to differentiate an accredited professional coach and a non-accredited coach. People here tend to ask for answers and solutions instantly, rather than to see the benefit of using a non-directive approach.
Iran	Coaching is still a new concept. People will not feel comfortable receiving info from coaches – they will not trust them.
Israel	No specific answer given.
Japan	<p>Coaching in Japan is very business oriented (there are less "life coaches"). In Japan there are two big markets regarding business coaching:</p> <ol style="list-style-type: none"> 1. Professional coaches providing coaching services (there are mainly two big coaching companies in Japan that provide 1:1 executive coaching, group coaching and coach trainings). 2. Business executives learning coaching skills as part of their management and leadership skills. We see more of this now in Japan. <p>There is a strong coaching community in Japan standing for non-directive coaching. According to its definition, coaches do not give advice. And coaches need to go through a professional coach training in order to be able to provide coaching services or call themselves "coaches". 1000s have already been trained in coaching in Japan or are calling themselves "coaches" (exact number is unknown). But only about 100 are also certified (80 by ICF). Around 3000 students already went through the ICF credentialed coach training program at Coach21 only.</p> <p>[The number of 2000 business coaches in Japan given in question b is a rough estimate on the basis of these and other figures/findings in this survey.]</p>

	[Cultural aspects like the principle of “saving face”, the importance of relationships, or existing expectations of clients to get direction and advice from the coach need to be kept in mind and dealt with properly at any time.]
Jordan	Business coaching has not yet visibly developed.
Kazakhstan	There is not enough information on what coaching is and acknowledgement of it. Coaches from abroad would need some time to introduce coaching and their way of working. The main focus in this regard should, in my view, be on the responsibilities of coach and coachee as well as on what kind of results can be reached. Responsibility is the key question, as it has a cultural dimension.
Kuwait	It is very important to know the local culture and language to get the best results.
Kyrgyzstan	Business coaching has not yet visibly developed.
Laos	Business coaching has not yet visibly developed.
Lebanon	Coaches need to establish a personal relationship, have empathy and relate to clients on the emotional level. They must be able to build trust in order for the coachee to feel safe and protected and share his or her concerns and issues. I started introducing the coaching concept in 2008 through a weekly radio show which made the word “coaching” quite common. However, many business institutions may know about coaching, but are still not ready yet to invest as companies in coaching and get its benefits for business growth.
Malaysia	It is important to know the local values and culture.
Mongolia	Business coaching has not yet visibly developed.
Myanmar	Business coaching has not yet visibly developed.
Nepal	No specific answer given.
North Korea	Business coaching has not yet visibly developed.
Oman	Business coaching has not yet visibly developed.
Pakistan	While sports coaching is highly developed (e.g. in cricket, hockey & squash), other types of coaching are nearly non-existent. Many people confuse coaching with mentoring, therapy (and therefore see it as a directive tool) or counselling. Accordingly, coaching on work issues for business people is, where it is done at all, basically provided by counsellors and therapists. There is generally low awareness of the impact and benefits of business coaching.
Philippines	Coaching is highly relational (relationship-based). It is mostly understood as part of management skills, whereas coaching in the classic form of a one-to-one intervention provided by professional coaches is not widely used. Among the coaches that exist, there are more coaches who are self-proclaimed than those formally trained. Overall, there is still room for further optimization to leverage the full potential of coaching.
Qatar	It is just beginning. So more information/education is needed on what is coaching.
Saudi Arabia	In order to be successful, coaches need to offer something new and distinguished, such as certificates, foreign certified trainings or specific professional programs (e.g. six sigma). There is a shortage in professional training in some areas. [It seems coaches are rather seen as some kind of trainers.]

Singapore	<p>Coaching is very results-focused. Thus, the measurement of coaching outcomes is very important. Because of this, coaching forms like the coaching culture approach, the benefits of which are highly difficult to measure, have rare chances to be adopted in Singapore.</p> <p>There are differences in language/terminology that coaches should keep in mind: For example in the US the term "executive" denotes a high level corporate manager or officer. In Singapore/Malaysia, the term denotes a much lower level manager (a little higher than supervisor). Cultural nuances can thus give quite different meanings.</p>
South Korea	<p>Coaching is growing fast. The number seems to have doubled in the last three years. Korea is the 2nd largest coaching market (after Japan) in Asia, but we may become the largest one. At the moment, Japan is 3 to 4 years ahead of Korea on ACTP training (Accredited Coach Training Programme). Today, in Korea, there are two strong ACTP companies, and 5 companies are sharing 90% of the coaching market. These coaching companies prefer the well organized big corporations to buy their services. (One-to-one life coaching has just started, but doesn't create proper profit yet.)</p>
Sri Lanka	<p>There are cultural issues, such as a reluctance to give feedback, face saving, reluctance to have challenging conversations, strong national pride, etc. that non-Sri Lankan coaches should be aware of. This could impact the coach's ability to get to the core of the issue. Clients may not undertake challenging actions, even if they agreed upon it in a coaching session. There may for example be repercussions in some organisations if they challenge their superiors, etc..</p> <p>There are lots of trainers of varying capability who carry out coaching assignments for clients. In many cases, a company which has used a particular trainer and feels that he/she is capable of coaching, or speaks to another company who has used that trainer's coaching services and found them effective, would prefer to use that trainer. In this respect, coaches are selected as one might select a management consultant or trainer (as the coaches frequently are).</p> <p>There is no insistence on particular qualifications or professional bodies, but selection of coaching relies more on personal assessment. This is much more effective here than might be in a larger country such as the USA or UK, because most of the people know each other personally (or know someone who does).</p> <p>In the end, there are maybe only less than 20 professional coaches in Sri Lanka who can be said to really have the requisite coaching skills & experience. However many trainers & consultants are also involved in coaching in one way or other.</p>
Syria	Business coaching has not yet visibly developed.
Tajikistan	Nothing specific.
Thailand	<p>Thai culture requires the establishment of a lot of trust between coach and coachee before feedback can be provided - upon request by the coachee - in a straightforward manner by the coach. Most Thai coachees will seek a lot of advice, which the coach should resist providing, for the sake of efficiency of the process.</p>
Turkmenistan	Business coaching has not yet visibly developed.
United Arab Emirates	<p>The array of nationalities and cultures plays a considerable role. The UAE has many different nationalities living and working here – all working in their own unique way based on their past experiences. There is a balance of bringing in expats with knowledge, skills and experience and at the same time equipping the Emaratis (local UAE nationals) with the skills to develop into future leaders of the country. Emaratisation is happening in most companies, whereby a certain percentage of the workforce have to be Emaratis. - This demographic aspect is very important for coaches to be aware of.</p>

Uzbekistan	You still rarely find any openness for coaching among managers. Instead, there is often an attitude, in particular among senior managers, to say "I know everything I need". As a result, it may happen they don't even listen to the idea of coaching.
Vietnam	Coaching is very new. So there is a lot of upfront information and orientation needed with new clients. In addition, cultural challenges to be aware of when coaching in Vietnam exist. For these reasons, coaching expats may seem easier than coaching Vietnamese. But this may change dramatically within the next 5 years.
Yemen	Business coaching has not yet visibly developed.



f Use of supervision by coaches

Question asked:

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

ASIA		
++	Agree strongly	1
+	Agree	6
o	Undecided	6
o	Undecided**	16
-	Disagree	8
--	Disagree strongly	5
Total		42

*o = undecided because there is no visible coaching industry in the country yet, that could be identified from outside

The use of supervision is widely spread in 7 countries. Remarkably, 5 of these have a very small coaching industry (around 10 business coaches only).

Where supervision is widely spread:

Japan

Kuwait

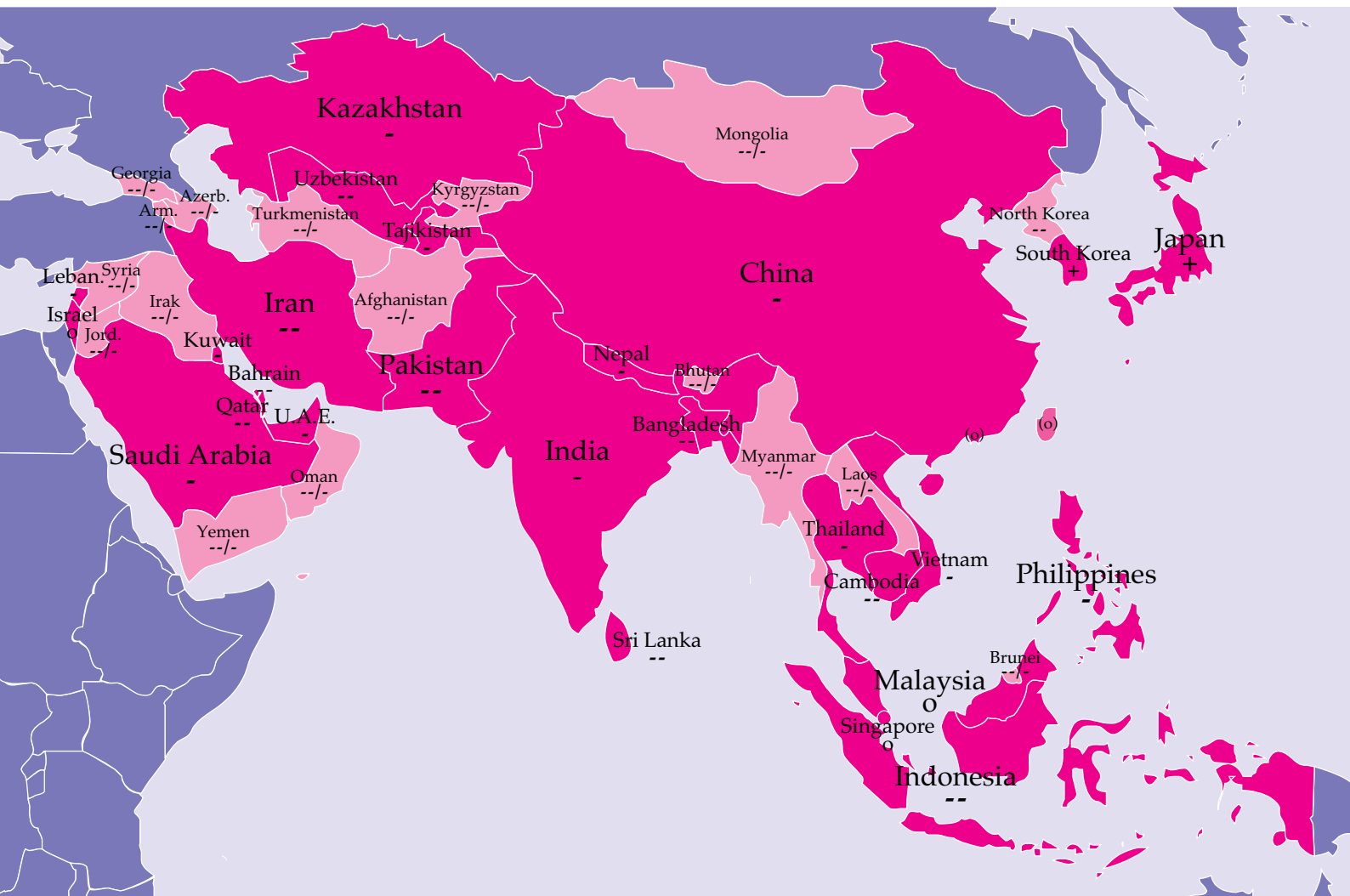
Nepal

Saudi Arabia

South Korea

Thailand

Vietnam



ASIA		
++	Agree strongly	-
+	Agree	2
o	Undecided	3
-	Disagree	9
--	Disagree strongly	13
--/-	countries where it is unclear whether it is "disagree" or "strongly disagree"	15
Total		42

g Coaching on its way to becoming a real profession

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.)?

In Japan and South Korea, one-to-one business coaching is well advanced towards a profession. In 37 countries, it is not. Only in 3 countries, this is undecided. There is a tendency in Asia to see and develop coaching more as a service rather than as a profession.

International coaching associations are quite active in Asia and contribute to the development of coaching there. At the same time, a number of local coaching initiatives have already emerged in Asia and have started to define and develop coaching specifically for the respective region or country:

National or regional coaching bodies partly exist (e.g. Japan Coach Association, JCA; Hong Kong International Coaching Community, HHICC; Israeli Coaching Society) or are starting to emerge and be formalized (e.g. Vietnam Alliance of Coaches, Indian Coaches Association).

Also a first international coaching association in the region has been set up: the newly established Asia-Pacific Alliance of Coaches (APAC) has active members in several countries and will hold its first international conference in Singapore in 2010. It is one of the first supra-regional, international coaching associations in the world not being of Anglo-Saxon origin (/head-quarter) So coaching is clearly on the rise and in the process of becoming more mature in Asia in terms of quality and infrastructure.

However, coaching is still mainly driven and determined by multinational clients or international coaching. As a result, you rarely find specific Asian coaching forms and approaches. So while local initiatives increasingly take place in Asia, these still remain rather limited.

Coaching becoming a real profession:

Japan	+
South Korea	+
Israel	o
Malaysia	o
Singapore	o

Follow-up question:

“Explain your answer to the previous question”

Results:

The following table provides an overview of the answers given in each country (completed by our findings where needed). It may serve you as a source to look up your specific countries of interest.

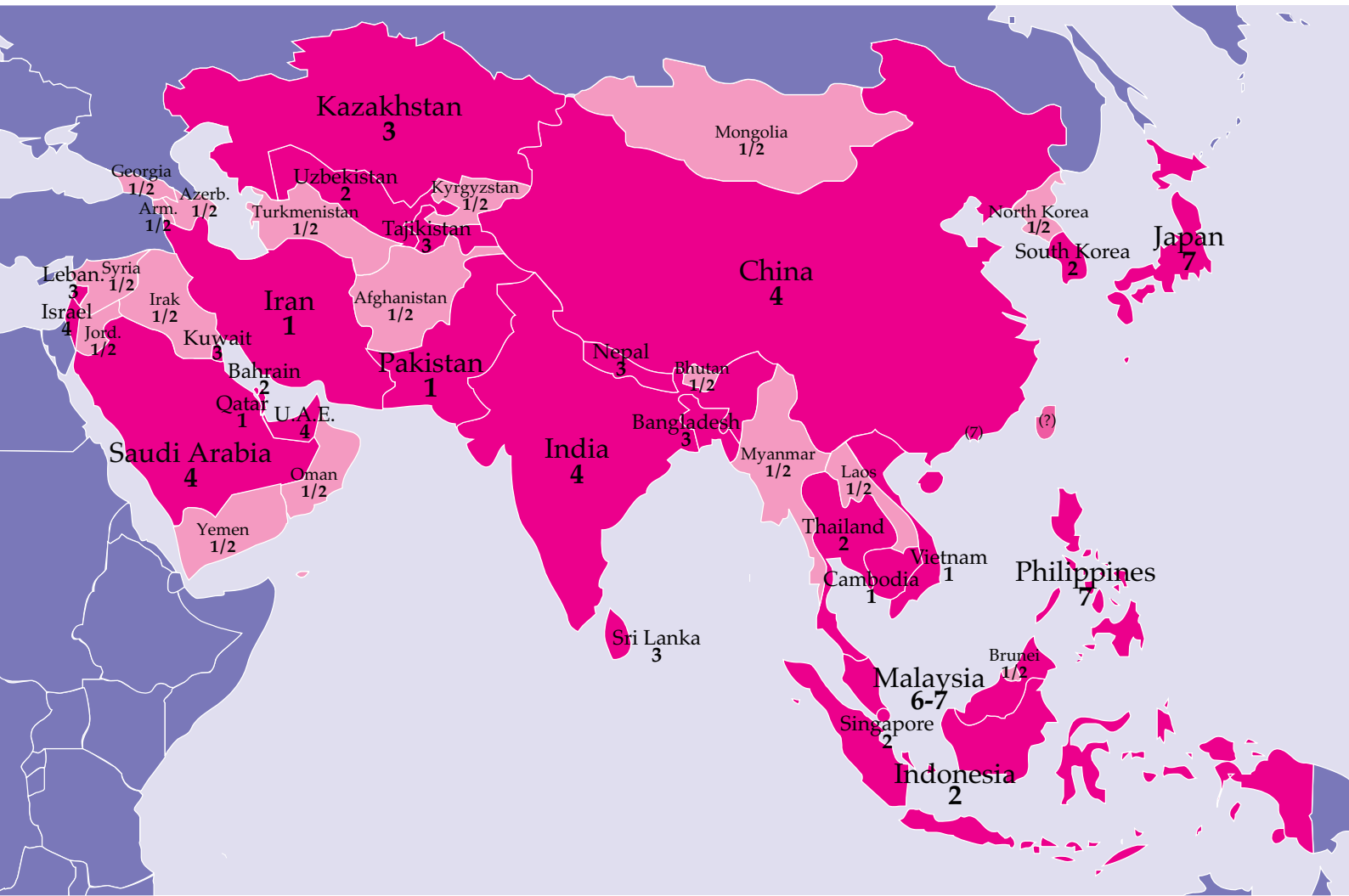
Afghanistan	Business coaching has not yet visibly developed.
Armenia	Business coaching has not yet visibly developed.
Azerbaijan	Business coaching has not yet visibly developed.
Bahrain	There is not even a coaching network here yet. This is done only very informally.
Bangladesh	Only a few multinational companies hire coaching services. Others just want training to be conducted with coaching as a topic, but not showing any interest in hiring such services.
Bhutan	Business coaching has not yet visibly developed.
Brunei	Business coaching has not yet visibly developed.
Cambodia	There are no registered coaching bodies, accreditation units, or professional support organizations, nor professional coaches operating regularly in Cambodia.

China	<p>Coaching is still rather undeveloped. Most of the coaches in China are still in the surviving stage. They spend time to educate the clients, the government and society. There is generally a lack of professional coaching associations.</p> <p>However, there are already the Hong Kong International Coaching Community (HKICC), three ICF Chapters as well as five IAC Chapters. Also, a “China Coach Association” (CCA) had been created in China in between by a privately owned company, but it doesn’t exist any more.</p> <p>Regarding the HKICC, it was established in Hong Kong in 2002 and developed to become one of the largest coaching associations in Asia (over 150 members so far). It has “coaching standards” which are rather basic as of now, but is in the process of developing into a proper coaching body.</p> <p>Supra-regional, nation-wide coaching associations bringing together coaches from different regions of China more in one learning network/community are still missing, but may be a next step to emerge.</p>
	<p>Chinese Taipeh/Taiwan (under the de facto control of the ROC government, claimed in whole by the PRC)</p> <p>In the Taiwanese coaching market, coaching is in the introduction phase. There are around 50 - 100 coaches. An ICF Chapter Taiwan exists [as well as an IAC Chapter Taiwan]. Many of the coaches do not classify between business and life coaching that clearly.</p>
Georgia	Business coaching has not yet visibly developed.
India	<p>Coaching has just started in India and is still in its infancy. However, there are also strong ambitions and efforts to make coaching grow further and become more professionalized. For example, while, at present, in India there may only be five certified ICF accredited coaches as of now, the member figures and number of ICF Chapters are growing steadily.</p> <p>[There are 8 ICF Chapters.]</p>
Indonesia	<p>We don’t have any professional coaching body yet. Coaching is still a new profession and needs to reach the community and socialize more. [A local IAC Jakarta Chapter already exists.]</p>
Iran	No specific answer given.
Israel	<p>No specific answer given.</p> <p>[There is an Israeli Coaching Society and an ICF Chapter Israel.]</p>
Japan	<p>Professional coaching bodies, accreditation and codes of ethics are generally at a high level of development. The Japan Coach Association (JCA) - providing big conferences once a year with more than 300 coaches signing up – as well as two ICF Chapters in Japan and Tokyo are such examples.</p> <p>However, while 1000s have been trained in coaching (around 3000 students already went through the ICF credentialed coach training program at Coach21) and while the number is unknown how many people exactly call themselves “coach” in Japan, only about 100 are also certified/accredited (80 by ICF).</p> <p>[The number of 2000 business coaches given in question b is a rough estimate of the operating business coaches in Japan, be they accredited or not or a member of an association or not.]</p>
Jordan	Business coaching has not yet visibly developed.
Kazakhstan	<p>Coaching is a new trend in our market, but there is no organisation/association in our country yet, that would gather statistical data on it. The Coaching Center Global were the first who “brought” coaching into Kazakhstan, as an ICF accredited program. The first introduction of coaching started in 2005. We only have 5 classes of graduates, and not all of them use coach-</p>

	ing as their real profession. The only source of receiving coach accreditation is actually through ICF, but due to the fact that not all people speak English, there are no accredited coaches in Kazakhstan yet.
Kuwait	A coaching body doesn't exist yet. According to my knowledge, I am the first accredited professional coach here in Kuwait promoting coaching and speaking the Arabic Language. Coaching is mainly asked for by global companies.
Kyrgyzstan	Business coaching has not yet visibly developed.
Laos	Business coaching has not yet visibly developed.
Lebanon	I do believe there is a great need for coaches in Lebanon and the Arab regions. But coaching is not advanced yet. I am hoping to create a code of ethics and bond with an international coaching association in the future. This would put the right system in place preventing any charlatan from using the coaching field for other purposes.
Malaysia	The awareness of and need for accreditation is gaining ground. [An ICF Chapter exists.]
Mongolia	Business coaching has not yet visibly developed.
Myanmar	Business coaching has not yet visibly developed.
Nepal	No specific answer given. [There is an ICF Chapter.]
North Korea	Business coaching has not yet visibly developed.
Oman	Business coaching has not yet visibly developed.
Pakistan	A lot of grass root work still needs to be done especially to establish coaching bodies, accreditation and to bring together professionals on one platform. While sports coaching is highly developed, business coaching is nearly non-existent. Many people confuse coaching with mentoring or counselling or are simply not aware of the impact of coaching on business performance.
Philippines	There are more coaches who are self-proclaimed than those formally trained. [There is an ICF Chapter.]
Qatar	It is just beginning.
Saudi Arabia	[There is no coaching association. It seems, coaches are rather seen as trainers who generally should be well certified and professional.]
Singapore	Much as coaches may want it, many professional people do not put coaching on the same footing as law, medicine, engineering, architecture (etc.). [A number of professional coaching associations is present and active in Singapore: the Asia Pacific Alliance of Coaches (APAC) is based in Singapore. Also there is an ICF Chapter Singapore and the Singapore Chapter of the International Association of Coaching (SCIAC).]
South Korea	There is a high number of accredited coaches as well as coaches seeking and applying for accreditation. [Two ICF Chapters and one IAC Chapter exist in South Korea.]
Sri Lanka	The selection of coaches highly relies on personal assessment (there is no insistence on particular qualifications or membership in coaching bodies). This approach is much more effective here than might be in a larger country such as the USA or UK, because most people know each other personally (or know someone who does).

There are individual companies like Sensei International, who operate in Sri Lanka, whose own values and standards safeguard the conduct of coaches, consultants & trainers, and the integrity of the services they deliver. Also, various international coaches of Sensei have joined APAC and other international bodies, although there is no client company insistence on this.

Syria	Business coaching has not yet visibly developed.
Tajikistan	One-to-one coaching isn't yet advanced on its way to becoming a real profession.
Thailand	There is no local coaching body or international chapter [only individual members of ICF and APAC]. At the same time, many HR professionals provide coaching services part-time without being properly qualified. This threatens the reputation of coaching in its introductory phase in the Thai market.
Turkmenistan	Business coaching has not yet visibly developed.
United Arab Emirates	The UAE tends to be behind Europe and US with where coaching is. There are "only" a few coaching companies offering accredited coach training programmes already (this is growing). At the same time, there are also a lot of people calling themselves "coaches" who are not in fact qualified or accredited. The coaching profession is in the growth stage and may attract some people who are interested, because it is a growing industry, rather than because they truly want to become a professional coach.
Uzbekistan	People are not aware yet of what coaching is. Even some consulting companies have no idea of it. We neither have a professional coaching body nor a code of ethics. There are still too few coaches for this to happen.
Vietnam	Coaching is in its infancy, but we are trying to formalize the VAC (Vietnam Alliance of Coaches) and make every coach who operates in Vietnam an active member of VAC and international bodies. The next step will be to form an active quorum of interested coaches and start to formalize membership and officer procedures.
Yemen	Business coaching has not yet visibly developed.



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

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)?

In three countries (Japan, Philippines, Malaysia), the coaching culture concept is already well known and used. In another five countries (China, India, Israel, Saudi-Arabia, United Arab Emirates) this is partially the case.

Countries with 4 and more:

Japan	7
Philippines	7
Malaysia	6-7
China	4 (Hong Kong: 7; Beijing: 2)

India	4
Israel	4
Saudi Arabia	4
United Arab Emirates	4

ASIA		
1	not at all	5
1/2*		16
2		6
3		7
4		5
5		-
6		-
7		3**
8		-
9		-
10	very much	-
Answer “?”		-
Total		42

*1/2 = either 1 or 2, but very low
** = one of these is 6-7

2.3 GEOGRAPHICAL AREAS WITHIN ASIA

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

a. Eastern Asia (China, Japan, North Korea, South Korea, Mongolia)

This region represents the biggest coaching industry within Asia and comprises around 65% (2,800 - 3,000) of all Asian business coaches (4,300 - 4,700). However, there is a strong divide within the region in the development of coaching.

On the one hand, Japan (2,000 coaches) and South Korea (500) can be regarded as the biggest and most dynamic coaching area in Asia. In both countries, business coaching is in the growth phase, widely accepted and used, and far advanced in becoming a real profession. Coaches also use coach supervision. Japan may be some years ahead in the development when compared with South Korea, but the latter is catching up.

Major differences between the two are that the predominant style in South Korea is more directive, whereas it is non-directive in Japan. The coaching culture concept is well known and used in Japan, but in South Korea it is not.

Typical for both countries is that there are few, but very big key coaching providers in each national coaching market. Also coaching is very business-oriented (only very little life coaching takes place). In Japan, the coaching leadership/management style is also a big issue today.

On the other hand, there is Mongolia and North Korea where business coaching hasn't yet visibly developed. No coaching market could be identified from outside.

China is in between these two poles. Coaching is in the introduction phase overall (depending on the specific region, this may also differ: Hong Kong, for example, is in the growth phase) and there are about 300 - 500 business coaches in the country (Hong Kong: about 80). While coaching may not yet be widely accepted and used or far advanced on its way to becoming a real profession, it is making progress. For example, coaching associations or chapters do exist in different regions of the country.

The coaching culture concept is very differently known and used within China (e.g. well known in Hong Kong; not in Beijing). Both, the directive and non-directive coaching style can be found in China. What style is actually used, highly depends on clients' educational/knowledge background.

In the Taiwanese coaching market which is in the introduction phase, there are another 50 to 100 business coaches. Interestingly, many of the coaches do not separate business and life coaching that clearly.

b. Southeastern Asia (Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, Vietnam)

Singapore, Malaysia and the Philippines may be regarded as the second biggest and highly dynamic coaching region (besides Japan/South Korea) in Asia. They comprise at least 400 business coaches (around 10% of all Asian business coaches).

One-to-one coaching is widely accepted and used in Singapore and Malaysia. In fact, Singapore is the country with the second highest density of coaches in Asia (1 coach per 32,000 inhabitants). In the Philippines, this is undecided, but using a coaching management style is more widespread there than professional one-to-one coaching.

Coaching is in the growth phase in Singapore and the Philippines (introduction phase in Malaysia). Coach supervision doesn't play a major role. The prevailing 1:1 coaching approach is non-directive in Singapore/Malaysia, but directive in the Philippines. The coaching culture concept is known and used in the Philippines and in Malaysia, in Singapore it is not.

Interestingly, coaching is not yet too far advanced in becoming a profession in the three countries, though various coaching associations are very active in Singapore. In particular it is worth highlighting that the Asia Pacific Alliance of Coaches (APAC) is based and was founded in Singapore – it is one of the first supra-regional, international coaching associations in the world that has members in several countries and is not of Anglo-Saxon origin (/headquarter). (APAC will hold its first international conference in Singapore in 2010.)

This shows the emerging coaching dynamics in parts of Asia and that local communities have started to take ownership for defining and developing coaching specifically for their contexts and needs.

In this region overall, there is a clear divide between these three countries and the rest: In none of the other countries is coaching widely accepted and used, or far advanced in becoming a real profession. The numbers of business coaches are all very low. Countries with coaching being in the introduction phase are Thailand and Vietnam, where supervision is widely used and a non-directive coaching approach prevails (directive in Indonesia, but coaching is still rather in the pre-introduction phase there).

c. Southern Asia (Afghanistan, Bangladesh, Bhutan, India, Iran, Nepal, Pakistan, Sri Lanka)

Coaching is clearly in the infancy in this region. In no country is coaching widely accepted and used (in India this is undecided), or far advanced in becoming a profession.

Coaching is in the introduction phase in some countries: India, Sri Lanka, Bangladesh, Nepal, Pakistan. There is a slant towards directive coaching (in no country is non-directive coaching dominant). And coach supervision is widely used only in Nepal (undecided in India).

The numbers of business coaches are generally all very low in this region. And though India has 300 business coaches minimum (fourth highest number in Asia overall), this is still a very low number given the huge population of India: it means a density of 1 coach per 3.8 million inhabitants. From the 300+ business coaches in India, just about 20 are full time business coaches specializing in the private sector. There is a large number of outside coaches coming to coach in India. Most of the IT and multinational companies hire coaches from Europe, USA and Australia. At the same time, considerable effort is being made to make coaching grow and become more professional. The coaching culture concept is slightly known in India.

d. Western Asia (e.g. Armenia, Azerbaijan, Bahrain, Israel, Jordan, Kuwait, Lebanon, Qatar, Saudi Arabia, Syria, United Arab Emirates)

The United Arab Emirates (UAE) and Israel are the countries in this region with the most advanced coaching industries. The UAE have the highest density of coaches (1 coach per 30,000 inhabitants) in the whole of Asia and are the only country in Western Asia where coaching is in the growth phase (300 business coaches). However, coaching is still not widely accepted and used here yet (but it is undecided in UAE; the same in Israel, Lebanon and Bahrain), nor is coaching far advanced to becoming a profession. Only in Israel (100 business coaches), is this undecided.

Coaching is in the introduction phase in Bahrain, Kuwait, Lebanon and Saudi-Arabia as well, but the numbers of business coaches in the region are generally very low (except in UAE and Israel). The coaching culture concept is known in Israel, Saudi-Arabia and UAE. Coach supervision is widely used in Kuwait and Saudi-Arabia. There is a slant towards directive coaching (non-directive coaching prevails in no country).

e. Central Asia (Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan,)

While coaching is a trend in Kazakhstan (remarkable 200 business coaches) and Tajikistan (equally remarkable 100 coaches), and is in the introduction phase there, it isn't widely accepted and used, or far advanced in becoming a profession yet.

In none of the other countries does a major coaching industry exist so far. Coaching is in the pre-introduction or at best early introduction phase here.

Acknowledgement of our Work:

FRANK BRESSER CONSULTING

received Global HR Excellence Award 2011
and Global Coaching Leadership Award 2013



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3 . A U S T R A L A S I A



A U S T R A L A S I A

3 covered Australasian countries (in alphabetical order):
(comprising over 90% of the continent's population)

- Australia
- New Zealand
- Papua New Guinea

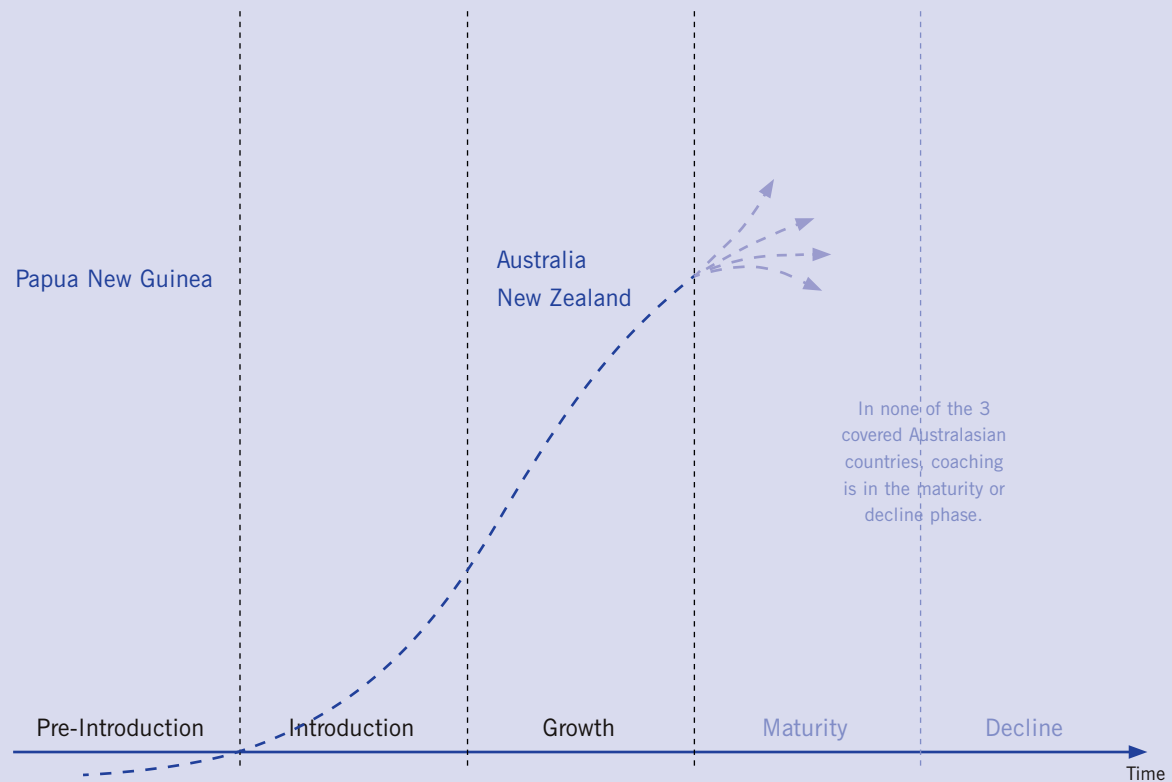


Figure: Current product-life-cycle stage of coaching in Australasia

3.1 OVERVIEW

There are about 4,300 business coaches operating in Australasia, of which around 4,000 are based in Australia and 300 in New Zealand (in Papua New Guinea, the estimate is up to 10).

Australasia is the continent with the highest density of coaches (1 coach per 7,500 inhabitants). Although it only represents 0.5 % of the world population, about 10% of all business coaches across the globe are based here.

There is a clear divide between Australia and New Zealand on the one hand, where coaching is in the growth phase, widely accepted and used as a business tool and well advanced towards becoming a profession and Papua New Guinea on the other hand, where it is still in the pre-introduction phase. (see figure above)

Australia has the highest density of coaches in the world (1:5,300); New Zealand has the fifth highest (1:14,300). Professional coaching bodies, accreditation and codes of ethics and are highly developed in Australia in particular.

A directive and straight-forward style of coaching is generally preferred and common practice in both countries.

Supervision is not currently widespread in Australasia, however it is increasingly gaining momentum in Australia and New Zealand.

In New Zealand, the coaching culture concept is well known and widely used, in Australia this is also the case, but less strongly.

3.2 MAIN THEMES

Let us now have a closer look at the key coaching aspects examined in the Global Coaching Survey one-by-one (see next pages).



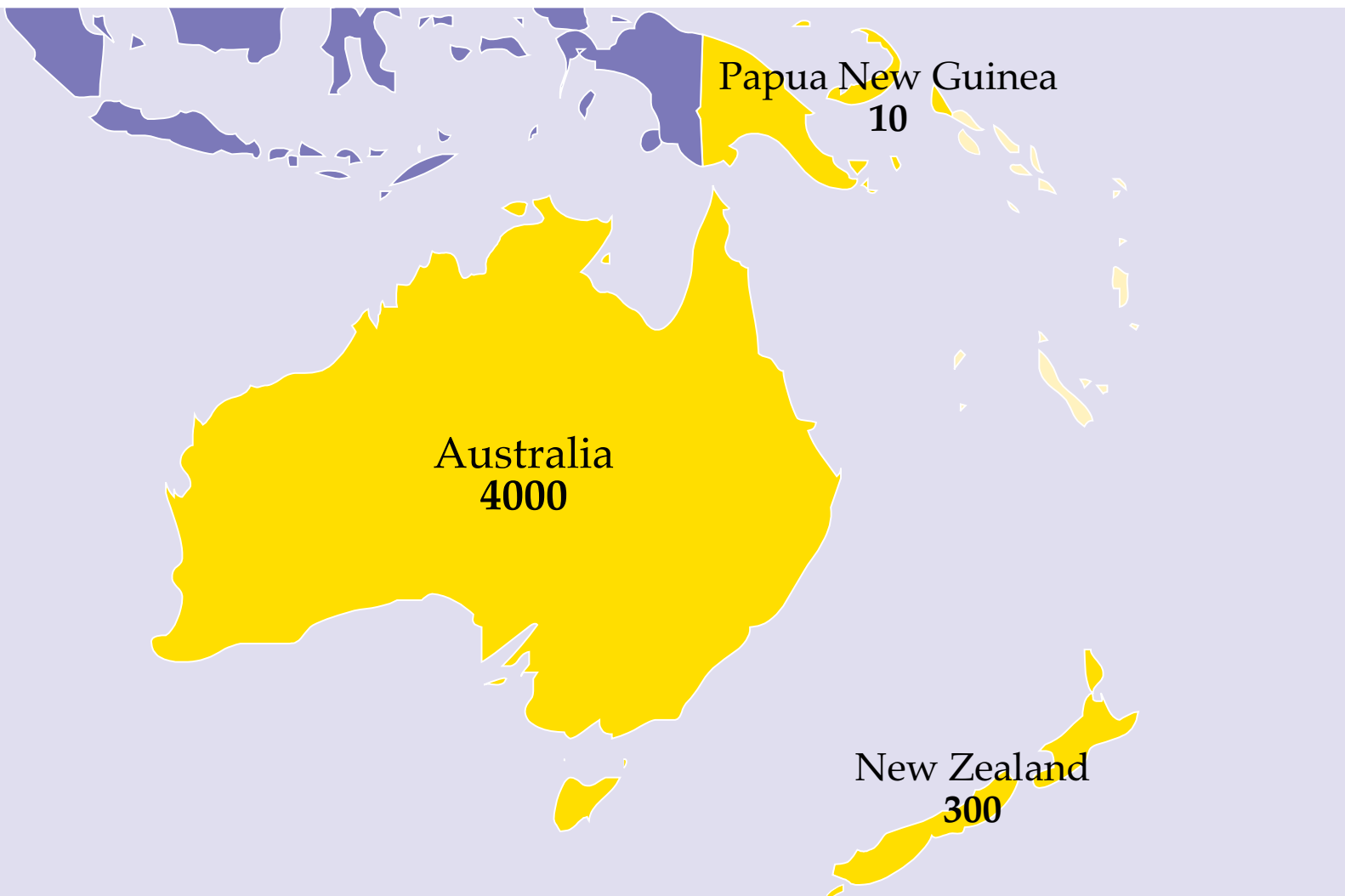
a Acceptance and use of coaching

Question asked:

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

AUSTRALASIA		
++	Agree strongly	-
+	Agree	2
o	Undecided	-
-	Disagree	1
--	Disagree strongly	-
Total		3

There is a clear divide between Australia and New Zealand on the one hand where coaching is widely accepted and used as a business tool, and Papua New Guinea on the other hand where it is not.



b Number of professional business coaches

Question asked:

How many professional one-to-one business coaches are there in your country?

There are about 4,300 business coaches operating in Australasia, of which around 4,000 are based in Australia and 300 in New Zealand.

Australasia is the continent with by far the highest density of coaches (1 coach per 7,500 inhabitants). Although it only represents 0.5 % of the world population, about 10% of all business coaches across the globe are based here.

Australia is the country with the highest density of coaches in the world (1 : 5,300), New Zealand's is the fifth highest (1 : 14,300).

Density of coaches:

1. Australia	1 : 5,300
2. New Zealand	1 : 14,300
3. Papua New Guinea	1 : 650,000

AUSTRALASIA	
Number of coaches	4300
Percentage of coaches worldwide	about 10% (9,9%)
Percentage of world population	0,5%
Density of coaches (1 Coach per number of inhabitants)	1 : 7.500

The figures in the map generally include all coaches offering business coaching – no matter whether they do this full or part time, with or without being accredited as a coach, as a member of a coaching association or not. Not included in the numbers are generally managers/leaders/consultants just doing their job in a coaching style.



C Phase of coaching in its product life cycle

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?

While coaching is in the growth phase in Australia and New Zealand, it is still in the pre-introduction phase in Papua New Guinea. (also see figure on p. 87)

AUSTRALASIA	
1 Pre-introduction	1
2 Introduction	-
3 Growth	2
4 Maturity	-
5 Decline	-
6 Relaunch	-
Total	3



d Directive /non-directive coaching approach

Question asked:

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

AUSTRALASIA		
DD	Highly directive	-
D	Directive	2
O	Undecided	1
N	Non-directive	-
NN	Highly non-directive	-
Total		3

A directive coaching approach is prevailing in Australasia and New Zealand, which may be seen as surprising by some given the predominant rather non-directive coaching approaches in USA and UK. So the Anglo-Saxon region is far from being homogeneous in terms of coaching style and practice across the globe.

In Papua New Guinea, this question is undecided - simply because business coaching hasn't yet visibly developed in the country.

e Local characteristics of coaching

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)?

A more straight-forward, direct way of coaching is generally preferred and common practice in Australia and New Zealand. In addition, coaching is rather directive in the two countries (see previous question).

In Papua New Guinea, coaching is still in its infancy and rarely known at all.

The following table provides a short overview of the answers given in each country.

Australia	Australian coachees prefer 'straight shooters' - that is direct and straight to the point coaching. We do not like being 'coddled'.
New Zealand	I think we have a direct approach, a good mix of soft skills and moving clients forward.
Papua New Guinea	Few people would even know such a capacity building activity exists.



f Use of supervision by coaches

Question asked:

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

In no country is supervision widely used by coaches today. However it is a topic increasingly gaining momentum in Australia as well as in New Zealand these days.

AUSTRALASIA		
++	Agree strongly	-
+	Agree	-
o	Undecided	-
-	Disagree	3
--	Disagree strongly	-
Total		3



g Coaching on its way to becoming a real profession

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.)?

In Australia and New Zealand, one-to-one business coaching is far advanced on its way to becoming a real profession. In Papua New Guinea, it is not.

AUSTRALASIA		
++	Agree strongly	-
+	Agree	2
o	Undecided	-
-	Disagree	1
--	Disagree strongly	-
Total		3

Follow-up question:

“Explain your answer to the previous question”

Results:

The following table provides an overview of the answers given in each country (completed by our findings where needed).

Australia	The International Coach Federation Australasia (ICFA) continues to attract new members (884 members as at Oct 2008). Many of those are either ICF credentialed or working towards their ICF credential. In October 2008 we had 126 credentialed coaches. We also have growth in the number of accredited coach training programs, now 11 in this region. [Professional coaching bodies, accreditation and codes of ethics are highly developed in general in Australia.]
New Zealand	We have an increasing number of coaches joining the ICFA and a huge increase in credentialed coaches in New Zealand. Organisations looking for coaching programs are quoting ICF Core Competencies in their ROI's as a benchmark for barriers to entry. Much more talk of accredited workplace coaching programmes is required in the marketplace, though. [3 ICF Chapters exist.]
Papua New Guinea	Coaching is a new concept.



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

Question asked:

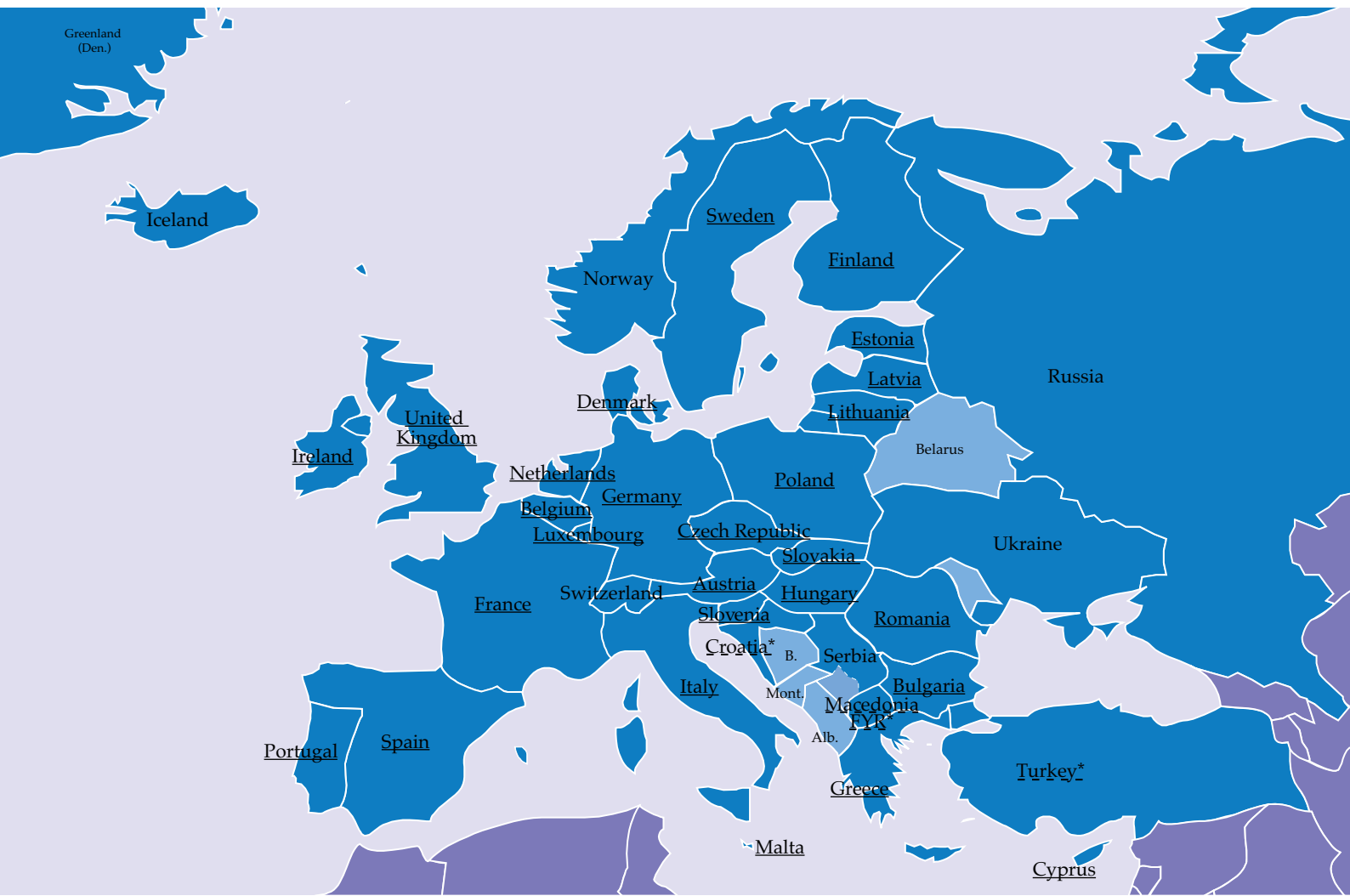
How well known and widely used is the concept of “coaching cultures” in your country in the coaching industry on a scale of 1 to 10 (1 = not at all, 10 = very much)?

AUSTRALASIA		
1	not at all	1
2		-
3		-
4		-
5		-
6		1
7		-
8		1
9		-
10	very much	-
Total		3

In New Zealand, the coaching culture concept is well known and widely used - in Australia this is also the case, but less strongly.

The concept is not known at all in Papua New Guinea.

4 . E U R O P E



EUROPE

Full colours = participating countries

Light colours = additionally researched countries

Underlined country names = 27 EU member countries

Country names with dashed lines = 3 EU candidate countries

41 covered European countries (in alphabetical order):

Albania	Greece	Poland	27 EU countries
Austria	Hungary	Portugal	Austria, Belgium, Bulgaria, Cyprus,
Belarus	Iceland	Romania	Czech Republic, Denmark, Estonia,
Belgium	Ireland	Russia	Finland, France, Germany, Greece,
Bosnia and Herzegovina	Italy	Serbia	Hungary, Ireland, Italy, Latvia,
Bulgaria	Latvia	Slovakia	Lithuania, Luxembourg, Malta,
Croatia	Lithuania	Slovenia	Netherlands, Poland, Portugal,
Cyprus	Luxembourg	Spain	Romania, Slovakia, Slovenia,
Czech Republic	Macedonia F.Y.R.	Sweden	Spain, Sweden, United Kingdom
Denmark	Malta	Switzerland	
Estonia	Moldova	Turkey	3 EU candidate countries
Finland	Montenegro	Ukraine	Croatia, Macedonia F.Y.R., Turkey
France	Netherlands	United Kingdom	11 Non EU countries
Germany	Norway		Albania, Belarus, Bosnia &
			Herzegovina, Iceland, Moldova,
			Montenegro, Norway, Russia,
			Serbia, Switzerland, Ukraine

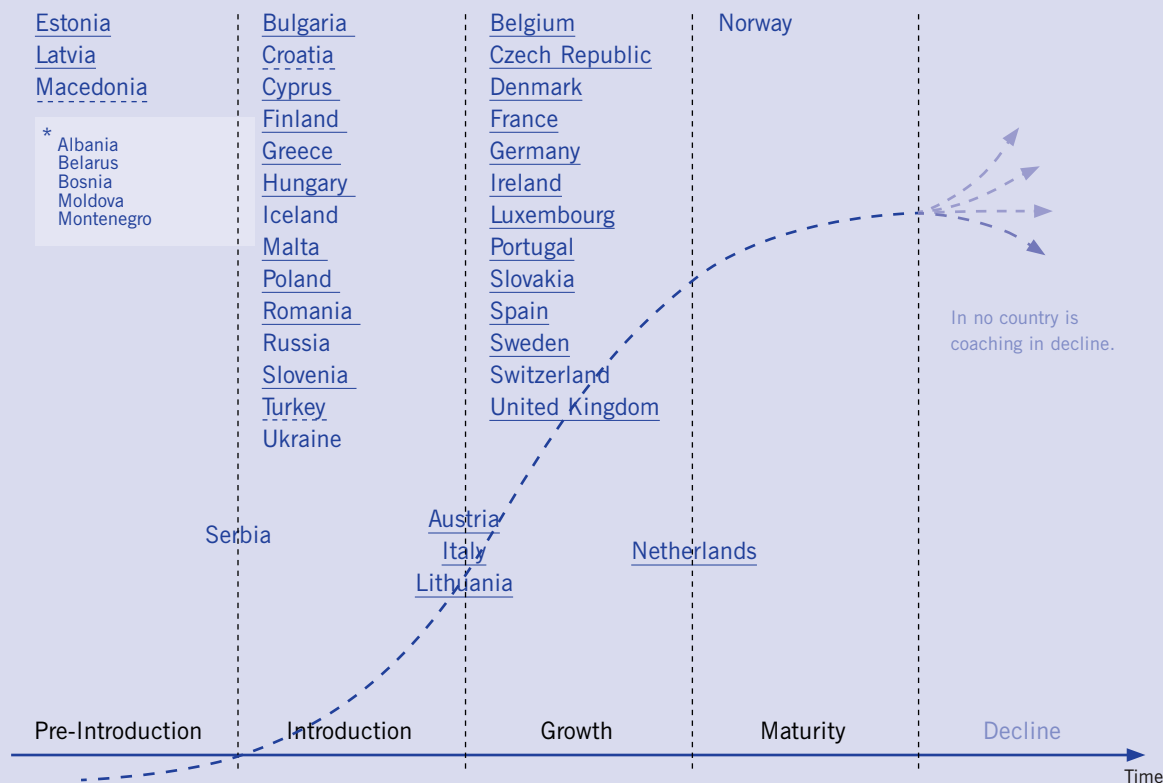


Figure: Current product-life-cycle stage of coaching in Europe

Underlined country names = 27 EU member countries
 Country names with dashed lines = 3 EU candidate countries
 * = countries in the pre-introduction phase and possibly early introduction

4.1 OVERVIEW

There are about 18,000 business coaches operating in Europe. It is therefore the continent with the highest number of coaches.

However, this is not evenly distributed; UK and Germany (nearly 20% of the European population) comprise around 70% of all business coaches on the continent. In contrast, only about 5% of all coaches are based in the area of the former communist countries (40% of the population).

The density of coaches in Europe is 1 coach per 45,000 inhabitants (without Germany and UK it would be 1:120,000). The density in the European Union is 1:29,000 (which is the same as the density of coaches in USA plus Canada).

The nature of coaching in Europe is generally characterized by a great diversity of coaching styles, practices and development degrees; probably due to the existing multiplicity of cultures and countries on the continent. Another significant element of coaching in Europe is the high degree of internationalisation and continuous convergence in the field.

Generally speaking, there is a 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 well developed coaching indus-

tries. 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 differ enormously.

Coaching may be far advanced in Europe, but there also remains a lot to be done.

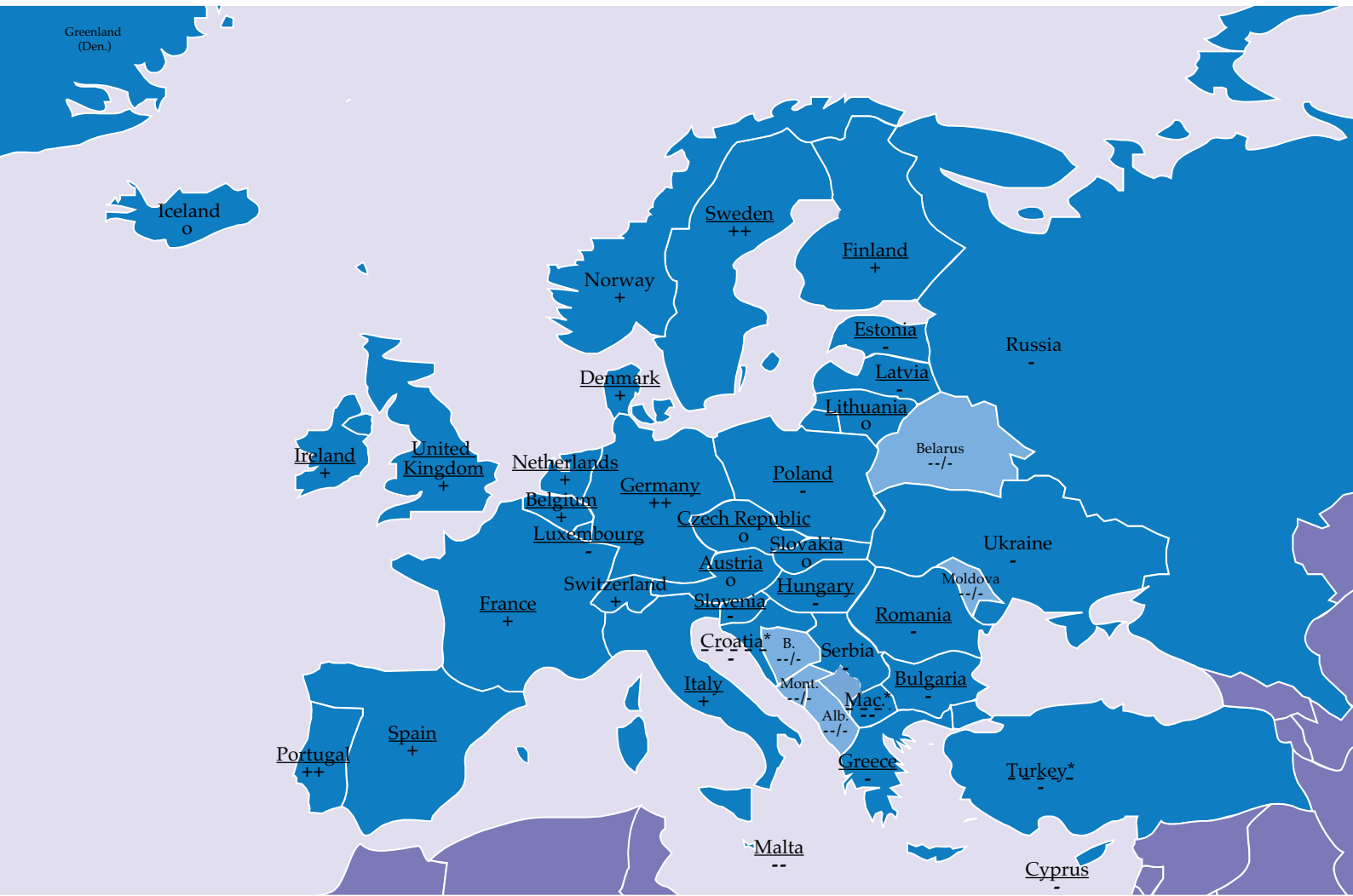
This is illustrated further by the following findings:

- In 14 countries (all Western/ Northern Europe), coaching is widely accepted and used as a business tool. However, in 22 countries it is not. In 5 countries this question is undecided.
- In 15 countries (mainly Western/Northern Europe), professional one-to-one coaching is far advanced towards becoming a profession. However, in 21 countries it is not. In 5 cases this is undecided.
- In 16 countries, business coaching is already in the growth phase, in another 15 countries it is in the introduction phase. In 2 countries, coaching has already entered the maturity phase. However, in 8 countries, coaching is still in the pre-introduction phase. (see figure above)

- Plenty of national as well as international coaching associations exist across Europe. In some countries there are several (e.g. Germany: about 20 major ones). So the infrastructure in terms of coaching bodies is well advanced in Europe. However this is less the case in Eastern and Southern Europe.
- There is a slight slant towards non-directive coaching in Europe. While in 4 countries a directive coaching approach prevails (Greece, Ireland, Latvia, Portugal), non-directive coaching predominates in 12 countries. However, in most countries (25), this is undecided.
- The use of supervision is widely spread in one fourth of the European countries (10), in 17 it is not. In 14 this is undecided.
- The concept of coaching cultures is quite well known and widely used in 10 countries; in another 10 countries coaching cultures are known. In 21 countries, however, the coaching culture concept is hardly or not known at all.

4.2 MAIN THEMES

Let us now have a closer look at the key coaching aspects examined in the Global Coaching Survey one-by-one (see next pages).



a Acceptance and use of coaching

Question asked:

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

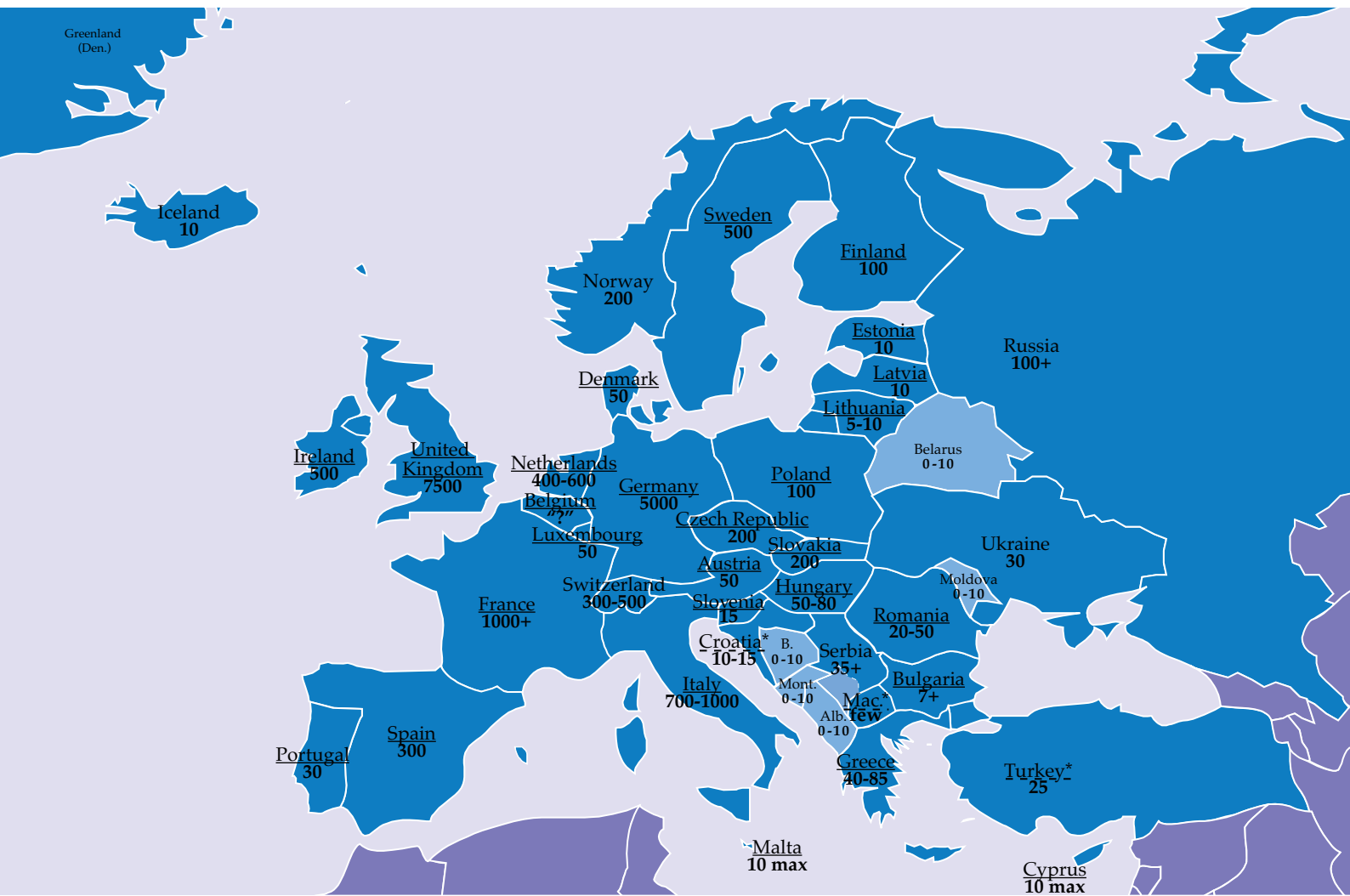
In 14 countries (all Western/ Northern Europe), coaching is widely accepted and used as a business tool. However, in 22 EU countries it is not. (In 5 countries this question is undecided.) The clear West-East and slight North-South divide in the development of coaching fully becomes visible here.

The 14 countries where coaching is widely accepted and used:

Belgium	Netherlands
Denmark	Norway
Finland	Portugal
France	Spain
Germany	Sweden
Ireland	Switzerland
Italy	United Kingdom

EUROPE		EU	EUC	Non EU	Total
++	Agree strongly	3	-	-	3
+	Agree	9	-	2	11
o	Undecided	4	-	1	5
-	Disagree	10	2	3	15
--	Disagree strongly	1	1	-	2
-/-	countries where it is unclear whether it is "disagree" or "strongly disagree"	-	-	5	5
Total		27	3	11	41

EU = 27 EU countries (underlined country names)
 EUC = 3 EU candidate countries (country names with dashed lines)
 Non EU = 11 Non-EU countries



b Number of professional business coaches

Question asked:

How many professional one-to-one business coaches are there in your country?

There are about 18,000 business coaches operating in Europe. It is therefore the continent with the highest number of coaches.

However, this is not evenly distributed; UK and Germany (nearly 20% of the European population) comprise around 70% of all business coaches on the continent. In contrast, only about 5% of all coaches are based in the area of the former communist countries (40% of the population).

EUROPE	
Number of coaches	18.000 + EU: about 17200 + EUC: about 50 Non EU: about 800
Percentage of coaches worldwide	about 40% (41,4%) (only EU: 39,5%)
Percentage of world population	12% (only EU: 7,4%)
Density of coaches (1 Coach per number of inhabitants)	1 : 45.000 (only EU: 1 : 29.000)

EU = 27 EU countries (underlined country names)
EUC = 3 EU candidate countries (country names with dashed lines)
Non EU = 11 Non-EU countries

Countries with the highest numbers of business coaches:

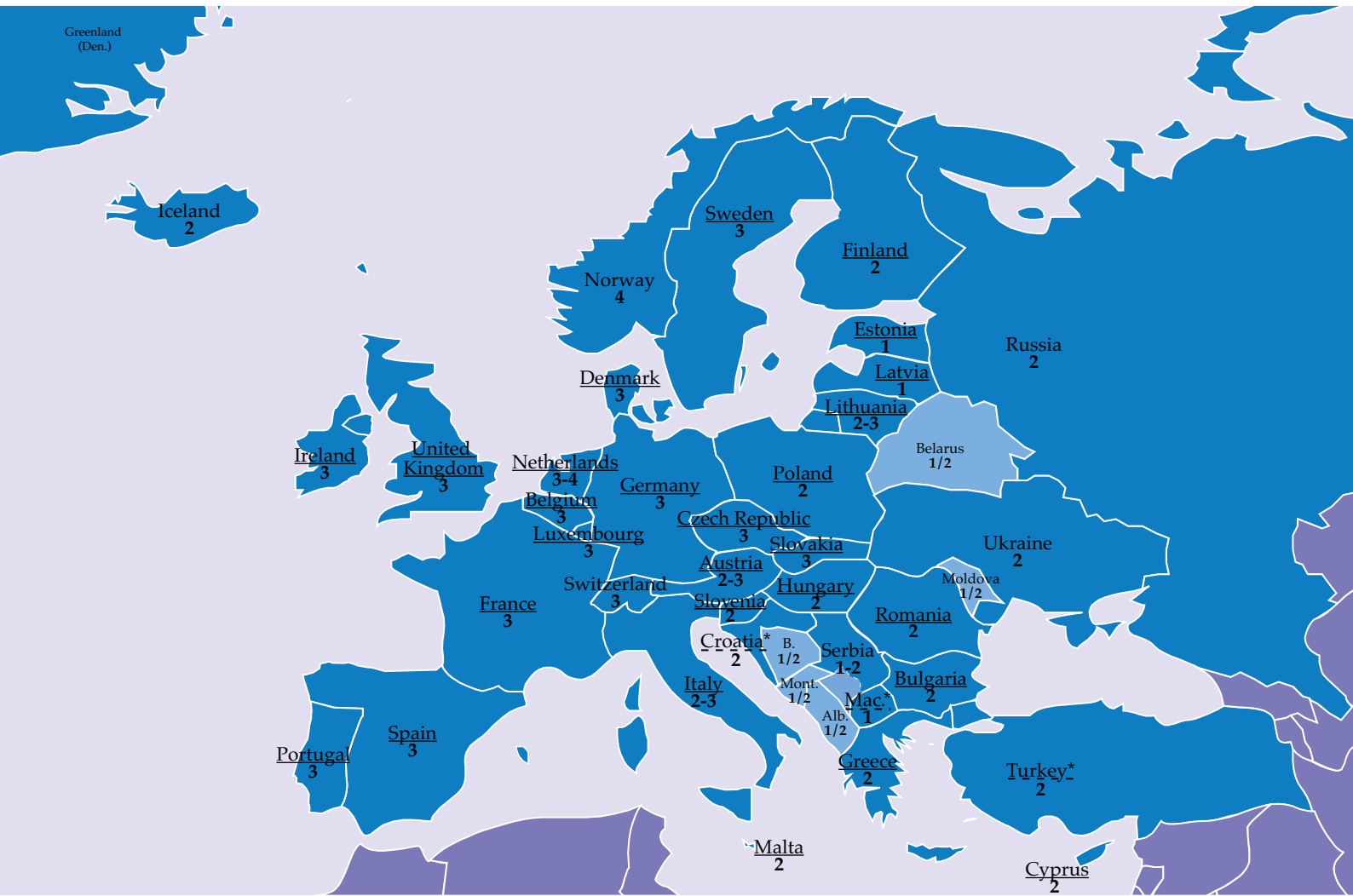
1. UK	7,500
2. Germany	5,000
3. France	1,000+
4. Italy	700 - 1,000
5. Netherlands	400 - 600
6. Sweden	500
7. Ireland	500
8. Switzerland	300 - 500
9. Spain	300

The density of coaches in Europe is 1 coach per 45,000 inhabitants (without Germany and UK it would be 1 : 120,000). The density in the European Union is 1 : 29,000 (which is the same as the density of coaches in USA plus Canada).

Ireland and UK are the countries with the highest density of coaches (1 : 8,000) in Europe and with the second highest in the world (after Australia).

Countries with the highest densities of coaches:

1. Ireland	1 : 8,000
2. United Kingdom	1 : 8,000
3. Luxembourg	1 : 10,000
4. Germany	1 : 16,500
5. Sweden	1 : 18,000
6. Switzerland	1 : 16,000 - 27,000
7. Slovakia	1 : 25,000
8. Norway	1 : 25,000
9. Iceland	1 : 30,000
10. Netherlands	1 : 28,000 - 42,500
11. Czech Republic	1 : 50,000
12. Finland	1 : 50,000
13. France	1 : 64,000 minimum
14. Italy	1 : 59,000 - 84,000
15. Denmark	1 : 100,000



EUROPE	EU	EUC	Non EU	Total
1 Pre-introduction	2	1	(5*)	3
2 Introduction	9	2	4**	15
3 Growth	15***	-	1	16
4 Maturity	1****	-	1	2
5 Decline	-	-	-	-
6 Relaunch	-	-	-	-
Total	27	3	11	41

* = countries either in the pre-introduction phase or maximum in the introduction phase (which one cannot be said with certainty from outside)
 ** = one of these is in between pre-introduction and introduction
 *** = three of these are in between introduction and growth (2-3)
 **** = "3-4"

EU = 27 EU countries (underlined country names)
 EUC = 3 EU candidate countries (country names with dashed lines)
 Non EU = 11 Non-EU countries

C Phase of coaching in its product life cycle

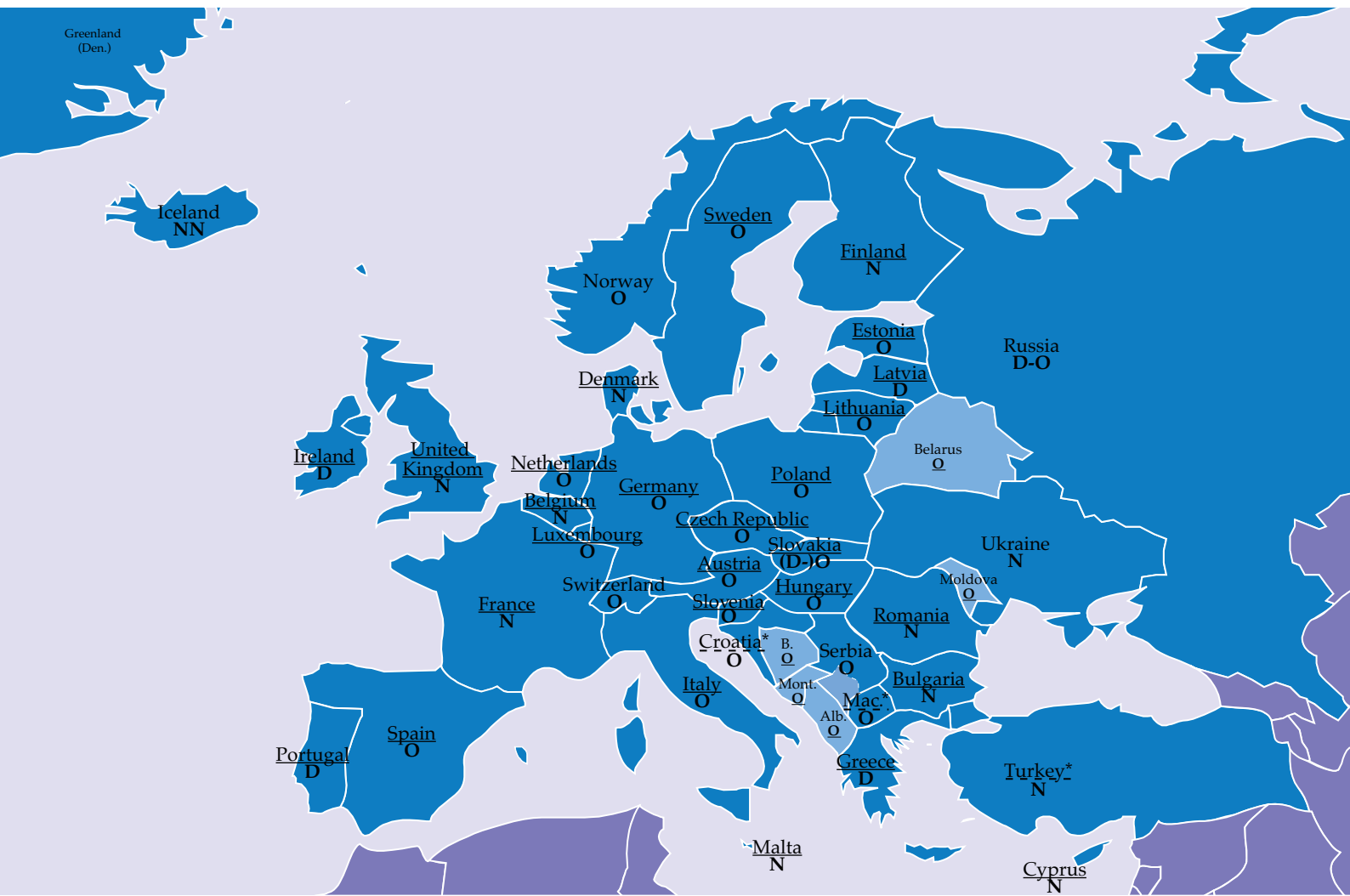
Question asked:

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?

Coaching is far advanced in Europe. In 16 countries, business coaching is in the growth phase, in another 15 countries it is in the introduction phase. In 2 countries, coaching has already entered the maturity phase. However, in 8 countries, coaching is still in the pre-introduction phase. In none of the 41 European countries, coaching is in decline. (also see figure on p.99)

The 18 countries having coaching in the maturity or growth phase:

Norway	4
Netherlands	3 - 4
Belgium	3
Czech Republic	3
Denmark	3
France	3
Germany	3
Ireland	3
Luxembourg	3
Portugal	3
Slovakia	3
Spain	3
Sweden	3
Switzerland	3
United Kingdom	3
Austria	2 - 3
Italy	2 - 3
Lithuania	2 - 3



d Directive / non-directive coaching approach

Question asked:

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

EUROPE		EU	EUC	Non EU	Total
DD	Highly directive	-	-	-	-
D	Directive	4	-	-	4
O	Undecided	14 **	2	4 **	20
O	Undecided*	-	-	5	5
N	Non-directive	9	1	1	11
NN	Highly non-directive	-	-	1	1
Total		27	3	11	41

* O = undecided because there is no visible coaching industry in the country yet, that could be identified from outside.
 ** = one of these: (D-)O

EU = 27 EU countries (underlined country names)
 EUC = 3 EU candidate countries (country names with dashed lines)
 Non EU = 11 Non-EU countries

There is a slight slant towards non-directive coaching in Europe. While in 4 countries a directive coaching approach prevails (Greece, Ireland, Latvia, Portugal), non-directive coaching predominates in 12 countries. However, in most countries (25), this is undecided. So there is no dominant European coaching approach in this regard.

Countries where coaching is predominantly non-directive:

Belgium	Iceland
Bulgaria	Malta
Cyprus	Romania
Denmark	Turkey
Finland	Ukraine
France	United Kingdom

e Local characteristics of coaching

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)?

There is definitely not *the* European coaching approach. Depending on each country, there are many different local characteristics and preferences in the way coaching is understood and delivered.

Generally speaking, there is a 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 differ enormously.

Diversity and internationalisation

The nature of coaching in Europe is generally characterized by the multiplicity of cultures, countries and coaching approaches. There is a vast variety of different coaching styles, practices and development degrees within Europe. This situation means we can't speak of a consistent, coherent European coaching understanding, but rather gives the impression of a patched quilt.

Given this great diversity of different coaching approaches, another interesting element of coaching in Europe is the high degree of internationalisation and continuous convergence in the field.

Originally, one-to-one business coaching - in its modern form - came to Western Europe from the US in the 80s, and it was 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. In many countries national coaching associations increasingly defined coaching autonomously.

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.

The diversity of national coaching approaches has increasingly become a source of mutual inspiration and learning. Once national coaching industries have gone through the process of self-discovery, a different kind of dialogue with each other is often starting: It is more about working together, sharing experiences and establishing best practices internationally.

After the opening of Eastern Europe, coaching also slowly started to reach these countries 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.

Finally, international coaching associations are increasingly founding national branches or chapters throughout Europe today. At the same time, they collaborate more and more with each other.

Common features of coaching in Europe

While there is a great diversity of coaching approaches within Europe, you may find some common features of coaching in Europe overall, when comparing these with coaching styles in other regions of the world:

For example, in the US, there is traditionally a highly individualistic coaching approach that focuses on the power of the individual to determine their own fortune. In contrast, in Japan and China a more collective attitude in coaching is said to predominate: the individual person defines him/herself through the group he/she belongs to. 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.

Similarly, the US coaching style is seen as very direct in terms of communication and openness, whereas it is considered to be rather indirect in a number of Asian countries 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 some regions of the world, people tend to perceive coaching in a highly remedial way. In Europe you find more of a mix and combination of both attitudes/approaches.

So, on the basis of these observations, it may be fair to say that the European coaching styles are diverse, but overall rather moderate when comparing these with other styles in the world.

The following table provides an overview of the answers given in each country (completed by our own findings where needed). It may serve you as a source to look up your specific countries of interest.

Albania	Business coaching has not yet visibly developed.
Austria	There is an 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.
Belarus	Business coaching has not yet visibly developed.
Belgium	There are no major points to be aware of – we feel coaching is more about people and not countries (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 coach supervision is one of the major criteria for a coach to be considered as a professional.)
Bosnia and Herzegovina	Business coaching has not yet visibly developed.
Bulgaria	Given the fact that coaching is a relatively new profession and area of interest for Bulgaria, there is a need to pay attention to: <ul style="list-style-type: none"> - 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

- preventing any speculation in the public and media about the coaching profession
Still it is quite early to talk about some typical styles in our country, as coaching is still new.

Croatia	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. A Croatia research project on coaching is on its way.
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.
Czech Republic	Most people making use of professional coaching are used to working in an international environment, so there is no specific problem in this regard. 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.
Denmark	Coaching has a very good balance between company interests and personal coachee interests.
Estonia	The fact that coaching is not yet a widely developed field of activity in business requires a lot of client education.
Finland	Nordic leadership is less hierarchical and uses more dialogue and discussion. This has an impact on coaching.
France	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. 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. 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. [There is also the AEC France.]
Germany	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).
Greece	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. 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.

Hungary	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.
Iceland	The industry is just starting off.
Ireland	<p>There is nothing fundamentally "special" about coaching in Ireland at this time compared to other countries.</p> <p>Face to face coaching is more prevalent than telephone coaching: most organisations and executives expect that coaching be undertaken face to face.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>There are few coaches whose practice is solely coaching. There are many people also providing consulting and training. Team coaching is in its infancy.</p>
Italy	Coaching sessions mostly take place face to face.
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. There is a need for a coaching association in Latvia.
Lithuania	Clients do not understand what coaching is and how to choose a good coach. Because of this, many consultants start to work as coaches, without special coach education.
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, but commutes daily from France, Belgium or Germany.
Macedonia F.Y.R.	<p>It seems there are no professional one-to-one coach trainers here.</p> <p>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>
Malta	Malta tends to be a highly prescriptive culture.
Moldova	Business coaching has not yet visibly developed.
Montenegro	Business coaching has not yet visibly developed.
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.

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>
Poland	<p>We only have few coaches for top business people.</p>
Portugal	<p>Portugal is a very conservative country. A coach must feel our culture, values and so on. Few foreign coaches are working here with success. 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.</p>
Romania	<p>It is a new tool.</p>
Russia	<p>Coaching is more feelings-oriented, rather than behaviour-oriented. And the emerging coaching market is rather "wild".</p> <p>About the market (according to estimates): About 1700 - 1900 people have completed a coaching course at one of the major coaching schools in Russia, so the teaching of coaching classes as such has become quite a good business. But it is important to know that this is not necessarily true for business coaching institutes – but above all for private, personal growth training companies and for psychotherapist companies (this may be one reason why businesses today are still rather reluctant to consider and use the term "coach" in their organisation):</p> <ul style="list-style-type: none"> - Maybe only 15 - 20 % of these 1700-1900 graduates (270 - 380) work as coaches, the other people use the coaching approach maximum in their managerial work / leadership. - Maybe 50 - 70% (135 - 266) of these coaches in turn work in the field of life coaching only - The other coaches (also) work in the field of business coaching (100 - 114). [This finally leads to an estimate of 100+ business coaches in Russia only.] <p>Coaching contracts mainly come from European and US companies, also from big Russian companies run by very advanced CEOs and HRs. So there are sometimes people in companies who are committed to developing a coaching approach in their organisation.</p> <p>However, there is no real, major customer market for business coaching in regions and the CIS yet. Business people haven't normally tried it out, and beginner coaches do not have enough experience and hours yet to demonstrate the professional work, its values and results. It would be great if they get coach supervision, but mostly they don't.</p> <p>Trainers and consultants are increasingly putting coaching on their portfolio of services for existing clients, but without having any proper qualifications.</p> <p>A 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>
Serbia	<p>People are not used to feedback here in general, for example to giving honest and positive feedback. Often they don't see the benefits of it or don't know how to do it. Bad time management is an issue. In our culture, it is a habit to be late and although participants agree with a rule "Be on time" at the start, often they do not respect it during the event itself. People are more people- than task-oriented. Besides the dominant male culture, there is another thing: respect for older people (here "old" means "experienced"). So as a young person, you are often considered to be not experienced enough.</p>

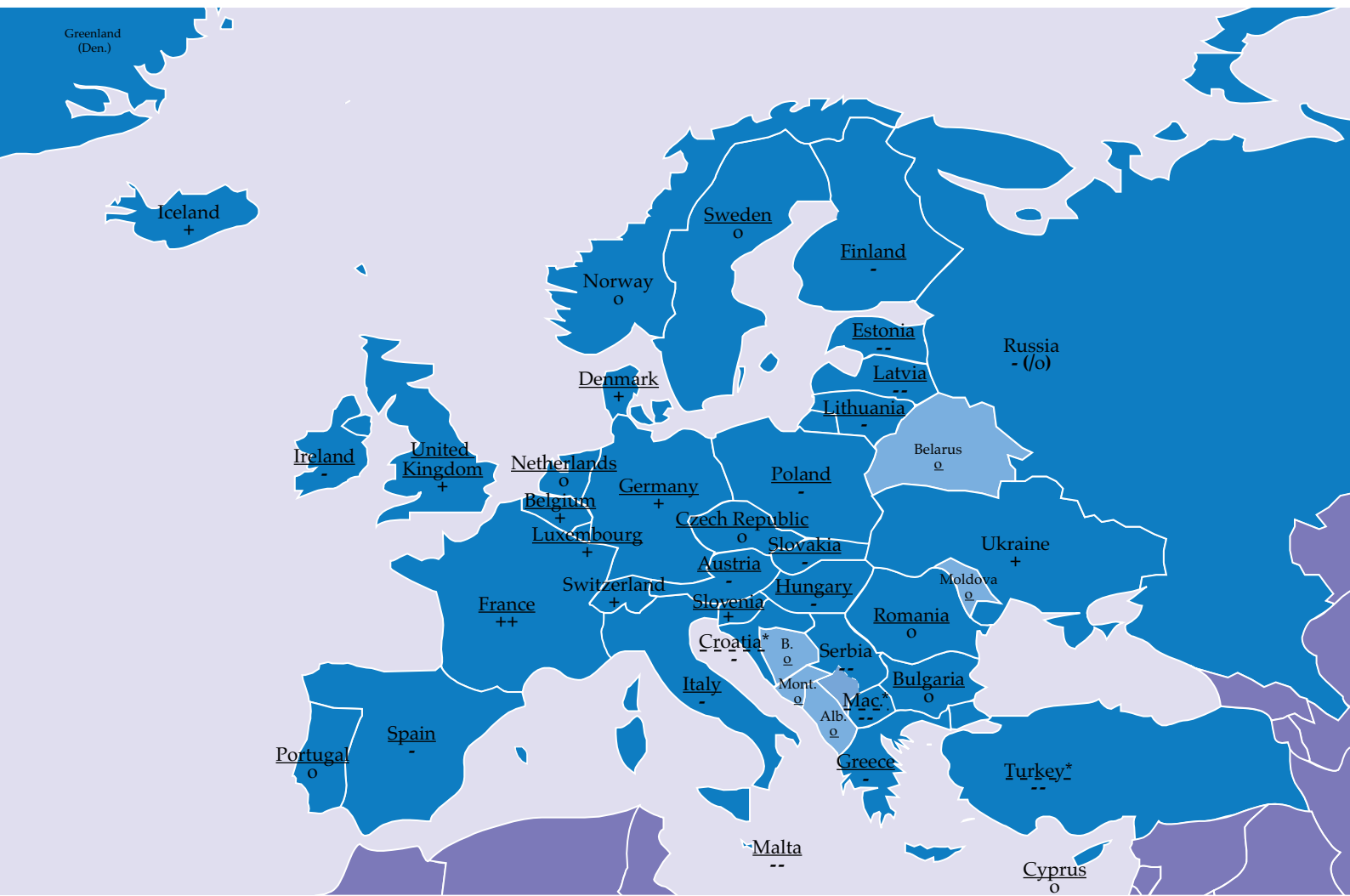
Slovakia	<p>More information is needed on what coaching is.</p> <p>On the one hand, most of Slovak managers expect that the coach is an advisor or trainer. So coaching is seen as a one-to-one training or one-to-one advising. That means the one-to-one setting is considered to be the only difference between 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.</p> <p>Also coaching is often seen in a rather 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 can then sometimes be: "I am O.K., they are not O.K."</p> <p>On the other hand, the coaching community largely promotes non-directive coaching and informs about it. Many coaches also would describe their style as non-directive – however, if this always actually also reflects their current practice, may be questioned. So the right, full balance between directive and non-directive coaching in Slovakia still needs to be found.</p> <p>There are a lot of investments going on by multinational companies in Slovakia. These firms bring some more coaching understanding into business here.</p> <p>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).</p>
Slovenia	<p>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.</p>
Spain	<p>No specific answer given.</p>
Sweden	<p>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.</p>
Switzerland	<p>Many different coaching styles mean different approaches and meeting different needs of clients. Therefore no general recommendations are possible.</p> <p>In Switzerland it is an important rule to be able to show an official recognition such as a Diploma SCA, SAV or BSO.</p>
Turkey	<p>Face-to-face sessions are being preferred (99%).</p> <p>The age of the coach is being considered in the advantage of older coaches.</p> <p>Because of Turkish culture and traditions, people do not talk about everything. There are still taboo subjects.</p> <p>The Turkey population is over 70 million and maybe 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>
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.</p>

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 and very big national companies; foreign managers prefer to work with foreign coaches (especially executive coaches).

United Kingdom

There is insufficient evidential research available.



f Use of supervision by coaches

Question asked:

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

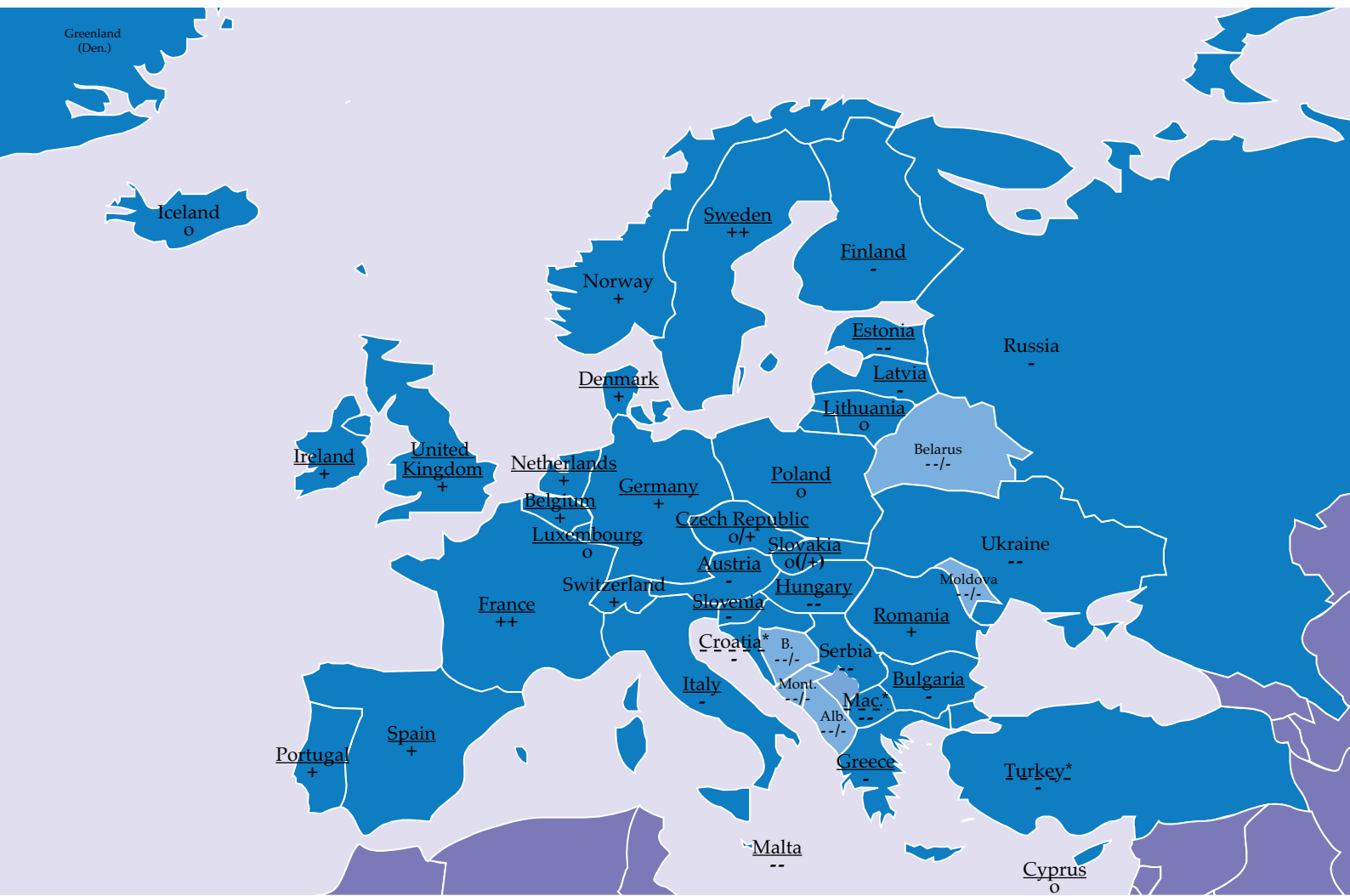
The use of supervision is widely spread in a quarter of the European countries (10), in 17 it is not. In 14 this is undecided.

The 10 countries where supervision is widely spread:

Belgium	Luxembourg
Denmark	Slovenia
France	Switzerland
Germany	Ukraine
Iceland	United Kingdom

EUROPE		EU	EUC	Non EU	Total
++	Agree strongly	1	-	-	1
+	Agree	6	-	3	9
o	Undecided	7	-	2*	9
o	Undecided**	-	-	5	5
-	Disagree	10	1	-	11
--	Disagree strongly	3	2	1	6
Total		27	3	11	41

* = one of these: disagree to undecided
 **o = undecided because there is no visible coaching industry in the country yet, that could be identified from outside.
 EU = 27 EU countries (underlined country names)
 EUC = 3 EU candidate countries (country names with dashed lines)
 Non EU = 11 Non-EU countries



g Coaching on its way to becoming a real profession

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.)?

In 15 countries (mainly Western/Northern Europe), professional one-to-one coaching is far advanced towards becoming a profession. However, in 21 countries it is not. In 5 cases this is undecided.

Plenty of national as well as international coaching associations exist all across Europe. In some countries there are several (e.g. Germany: about 20 major ones). So the infrastructure in terms of coaching bodies is very far advanced in Europe. However, this is less the case in Eastern and Southern Europe.

There is no official European umbrella coaching association, but European coaching bodies have started to emerge (e.g. EMCC from UK; AEC from France).

EUROPE		EU	EUC	Non EU	Total
++	Agree strongly	2	-	-	2
+	Agree	11*	-	2	13
o	Undecided	4	-	1	5
-	Disagree	7	2	1	10
--	Disagree strongly	3	1	2	6
-/-	countries where it is unclear whether it is "disagree" or "strongly disagree"	-	-	5	5
Total		27	3	11	41

* = two of these are in between undecided and agree (o/+)

EU = 27 EU countries (underlined country names)

EUC = 3 EU candidate countries (country names with dashed lines)

Non EU = 11 Non-EU countries

15 countries where coaching is already far advanced as a profession:

Belgium
 Czech Republic (o/+)
 Denmark
 France
 Germany
 Ireland
 Netherlands
 Norway
 Portugal
 Romania
 Slovakia (o/+)
 Spain
 Sweden
 Switzerland
 United Kingdom

Follow-up question:

“Explain your answer to the previous question”

Results:

The following table provides an overview of the answers given in each country (completed by our findings where needed). It may serve you as a source to look up your specific countries of interest.

Albania	Business coaching has not yet visibly developed.
Austria	The existing coaching bodies are nearly unknown. Clients know few about existing accreditations and ethical standards. [A national coaching association (ACC) and an ICF Chapter exist.]
Belarus	Business coaching has not yet visibly developed.
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 Belgium (AEC) and EMCC to validate their choices.

Bosnia and Herzegovina	Business coaching has not yet visibly developed.
Bulgaria	Coaching in our country is just starting. However, an ICF Chapter was recently founded in Bulgaria. The support and opportunities given by an international coaching association 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. The Manager magazine (September 2007) article "The personal trainer of the manager" stated around 3 to 4 names of certified coaches on the Bulgarian market.
Croatia	The foundation of a professional coaching association has been considered and planned for a longer time already and is clearly now making progress.
Cyprus	At the moment, I am not aware of any movement for coaches to get together and create a local group.
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 a code of ethics in coaching (CAKO as the Czech Coaching association and the Czech ICF Chapter). Also an EMCC body has been set up recently. 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.
Denmark	No specific answer given. [ICF Chapters as well as an EMCC Chapter exist.]
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. [There is an ICF Chapter.]
Finland	[There are two ICF Chapters – Finland and Nordic.]
France	There are two main professional bodies – the <i>Société Française de Coaching</i> (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. [There is also the Association Européenne de Coaching (AEC).]
Germany	[Professional coaching bodies, accreditation and codes of ethics are at a high level of development – there are 20 major coaching associations in Germany.] 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.
Greece	There doesn't exist any (official) professional coaching body yet in Greece. The profession of coaching is introduced, but not referred to officially. Acknowledgement 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. 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.

	<p>But there are also a number of internationally (USA and UK mostly) trained coaches who certainly fulfil the standards of knowledge and ethics.</p> <p>[An ICF Chapter exists.]</p>
Hungary	<p>There isn't any professional coaching education, and only a limited number of coaches have international accreditation (estimate: less than 5).</p> <p>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.</p> <p>[There is an ICF Chapter.]</p>
Iceland	<p>Coaching as a profession is just starting off here.</p>
Ireland	<p>With the launch of the Association for Coaching (AC) 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”. [Besides the AC Ireland, there is also the “Life & Business Coaching Association of Ireland”, an EMCC Chapter and an ICF Chapter.]</p>
Italy	<p>We are still establishing the coaching profession and informing potential clients about its solidity.</p> <p>[A national coaching body (Federazione Italiana Coach), an ICF Chapter and an IAC Chapter exist.]</p>
Latvia	<p>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.</p> <p>[There is an ICF Chapter.]</p>
Lithuania	<p>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 opened a coaching school recently and now try to bring the coaching culture into our country.</p> <p>[There is an ICF Chapter.]</p>
Luxembourg	<p>We founded our association in Luxembourg (AECL) 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).</p>
Macedonia F.Y.R.	<p>No specific answer given.</p>
Malta	<p>The profession is still in its infancy and as such there is no regulation.</p>
Moldova	<p>Business coaching has not yet visibly developed.</p>
Montenegro	<p>Business coaching has not yet visibly developed.</p>
Netherlands	<p>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.</p> <p>[Besides ICF Netherlands, there is also the large Dutch coaching association NOBCO and an EMCC Chapter Netherlands.]</p>

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.
Poland	We are just starting ICF in Poland. [An ICF Chapter exists.]
Portugal	We are doing the first steps towards the accreditation and organization of coaching in Portugal. [A coaching association (AIAC) and an ICF Chapter exist.]
Romania	A lot is happening. For example, coaches write articles and give info on ICF accreditation. An ICF Chapter exists. There are 6 certified coaches.
Russia	The coaching market in Russia is rather "wild". 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. [There is an ICF Chapter.]
Serbia	There are no accredited programs and no certified coaches, but only an EMCC code of ethics respected by the EMCC Serbia members.
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. A second, successful international coaching conference took place (in Bratislava) in 2008.
Slovenia	We are facing a shortage of good, solid coaching training programmes, because we are familiar only with basic NLP techniques.
Spain	Regarding ICF, from the 197 members of ICF, only 24 hold an ICF International Credential. Other 30 members are currently undergoing credentialing processes. [There are at least two national coaching associations (ASESCO and AECOP) as well as an ICF and an IAC Chapter.]
Sweden	Coaching is present in the market and the media, and the management has realised its potential. There is long term commitment and continuity within the trade organisation (ICF), and the number of coaching companies is growing. [Coaching bodies are well developed in Sweden, e.g. there are 4 ICF Chapters.]
Switzerland	Our Swiss Coaching Association (SCA) 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.

[Besides the SCA, there are also other coaching associations like an EMCC Chapter Switzerland, an IAC Chapter and 5 ICF Chapters.]

Turkey

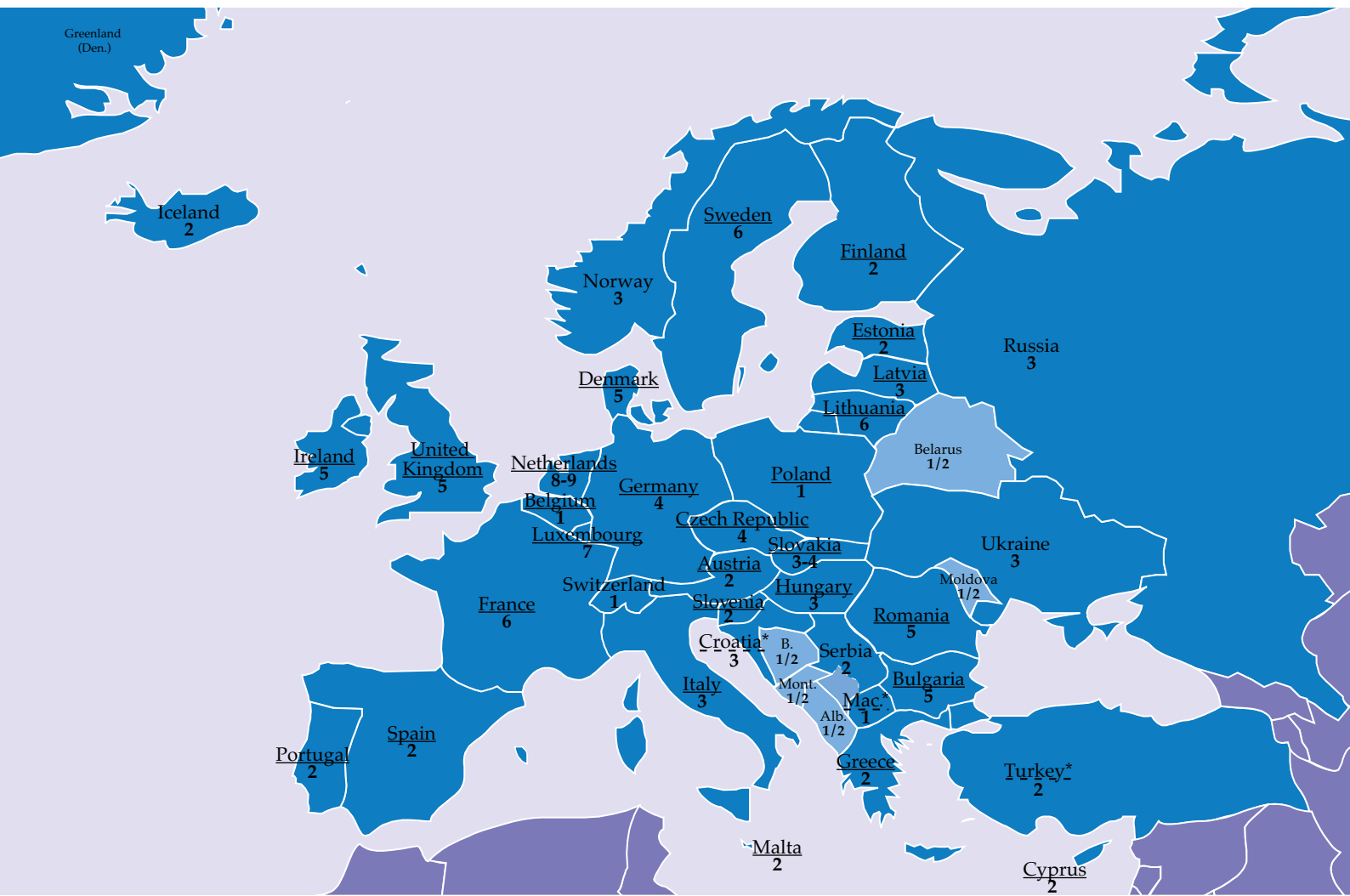
As ICF we strongly emphasize that this is a profession. However, there is not high awareness of the coaching concept in Turkey. Although it is being accepted that coaches need a special training to serve this profession, there are untrained coaches who just call themselves coaches. [Besides an ICF Chapter, there is also an EMCC Chapter.]

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. [There is an ICF Chapter.]

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 it is possible 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. [Coaching bodies are well developed: AC, EMCC, ICF, etc.]



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

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)?

The concept of coaching cultures is quite well known and widely used in 10 countries; in another 10 countries coaching cultures are known. In 21 countries, however, the coaching culture concept is hardly or not known at all.

EUROPE		EU	EUC	Non EU	Total
1	not at all	2	1	1	4
1/2*		-	-	5	5
2		9	1	2	12
3		3	1	3	7
4		3**	-	-	3
5		5	-	-	5
6		3	-	-	3
7		1	-	-	1
8		-	-	-	-
9		1***	-	-	1
10	very much	-	-	-	-
Total		27	3	11	41

*1/2 = either 1 or 2, but very low

** = one of these is "3-4"

*** = "8-9"

EU = 27 EU countries (underlined country names)

EUC = 3 EU candidate countries (country names with dashed lines)

Non EU = 11 Non-EU countries

Countries with the highest numbers:

Netherlands	8 - 9
Luxembourg	7
France	6
Lithuania	6
Sweden	6
Bulgaria	5
Denmark	5
Ireland	5
Romania	5
United Kingdom	5
Czech Republic	4
Germany	4
Slovakia	3 - 4

4.3. GEOGRAPHICAL AREAS WITHIN EUROPE

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

a. Comparison: UK and Germany

As UK and Germany are the biggest coaching markets (about 7,500 and 5,000 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 some (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 (the major ones total more than 20). These are highly competitive 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 and improvement of coaching in organisations by Frank Bresser Consulting in 2005, already touched this question and found the following:

- 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 contrasted with the 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 also a hot topic in the context of leadership and organisational culture.

Now, interestingly, the results of the Global 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 has opened up and evolved in recent years: The typical, predominant coaching style in Germany cannot be 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 change going on there as well: The concept of coaching cultures, for example, is now increasingly becoming known and used in Germany.

b. Founder Countries of the European Community (France, Italy, Netherlands, Belgium, Luxembourg, incl. Germany)

All founder countries of the European Community (including Germany) have well-developed, growing coaching industries. France (1,000 coaches minimum) and Italy (700 - 1,000) 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 less so in Luxembourg. Also, coaching is less far advanced on its way to becoming a real profession in Luxembourg and – even less – 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, but less so in 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, coaching in France is closer to psychology than in other countries, and a good code of ethics is seen as particularly important. In Italy, you find a strong preference for face-to-face coaching. Finally, coaching in Belgium, Luxembourg and the Netherlands strongly reflects the international, multi-cultural environment and is not too culture-specific.

c. Mediterranean countries (Spain, Portugal, Greece, Malta, Cyprus, Turkey)

In the region of these Mediterranean countries, 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. 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 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 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. Scandinavia (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 Global 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 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).

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.

Interestingly, 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. A directive coaching approach is prevailing in no country.

In terms of local characteristics of coaching, there is a 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. International influences are increasingly starting to change the traditional style though.

Interaction is also generally less hierarchical and uses more dialogue and discussion for example in Finland. 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 started to reach the former communist countries. On the one hand this later opening was a disadvantage, as these countries had no experience in coaching and needed time to catch up. On the other hand, this was an opportunity, as there was no past track record of any mistakes about coaching and so they could pick out from current best practice what would best meet their needs.

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 former communist countries in East Europe (Albania,

Belarus, Bosnia & Herzegovina, Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Macedonia, Moldova, Montenegro, Poland, Romania, Russia, Serbia, Slovakia, Slovenia and Ukraine), is coaching today widely accepted and used as a business tool. Only nearly 5% (about 850 coaches) of the 18,000 European business coaches are based in the former communist countries (though these comprise around 40% of the population of Europe).

Czech Republic and Slovakia

However, coaching has been progressing steadily - particularly in the Czech Republic and Slovakia. In these two countries, coaching is in the growth phase already, increasingly accepted and used as a business tool, and advancing towards becoming a profession. What is more, international coaching conferences are regularly taking place in both countries.

Russia

Coaching is gaining momentum and dynamism in Russia where coaching is in the introduction phase (at least 100 business coaches). Interestingly, coach training businesses are flourishing in the country and there are a number of coach schools. However, it is important to know that this is not necessarily true for business coaching institutes, but mainly for private, personal growth training companies and for psychotherapist companies. This may be one reason why businesses today are still rather reluctant to use the term "coach" in their organization.

Coaching contracts mainly come from European and US companies, also from big Russian companies run by advanced CEOs and HR Directors. So you sometimes find people also in local companies who are committed to developing a coaching approach in their organisation.

The coaching market in Russia is quite "wild". Accreditation is not a requirement yet for consultants who work as coaches. Few people have really completed a high-quality coaching training/accreditation.

When comparing the results of the European Coaching Survey 2007/2008 and the results of the Global Coaching Survey 2008/2009, we find that East Europe turns out to be a rather dynamic area, where coaching is gaining more momentum. Coaching made progress within very short time in the Bulgaria, Croatia, Czech Republic, Romania, Russia and Slovakia.

However, coaching still has a long way to go to become a profession in Eastern Europe. Coaching in Bulgaria, Croatia, Hungary, Poland, Romania, Slovenia and Ukraine is still in

the introduction phase. And it hasn't yet left the pre-introduction phase in Estonia, Latvia and Macedonia. No visible coaching industry could be identified in Albania, Belarus, Bosnia & Herzegovina, Moldova or Montenegro. In Serbia an international coaching association recently founded a new chapter (EMCC), so coaching is entering the introduction phase there now.

It can be observed that the coaching industry in East Europe is facing very similar issues and challenges today to those many Western European countries encountered 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 training
- Difficulty to start a business and win 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

Beyond these general points, the following, more region-specific aspects (mentioned by participants in their survey answers) may also be important and help to 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 find a lower significance and perceived value of individual learning and development measures in general and thus also of coaching; lack of a differentiated range of services and service providers; 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 mixed experiences of the Western influence. So there may be reservations about the West leading to reservations about coaching - as a service originally coming from the west - and Western coaches.

f. Other countries (Ireland, Austria, Switzerland)

Ireland

Ireland has the highest density of coaches in Europe besides the UK (1 coach per 8,000 inhabitants), the second highest in the world. 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 for face-to-face coaching (versus coaching by phone), and you find only a 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. 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 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 regulation) reasons only - feel forced to put on the hat of a consultant.

g. Special: The European Union (27 EU member countries, 3 EU candidate countries)

Based on the results of the Global Coaching Survey, we may assume that there are about 17,200 business coaches minimum operating in the European Union. The EU is one of the most highly developed coaching markets in the world and has an overall density of 1 business coach per 29,000

inhabitants. This, by the way, is exactly the same figure as the density of coaches in the region of USA plus Canada.

Interestingly, UK and Germany – with nearly 30% of the EU population – seem to accommodate over 70% of all EU coaches. France comes third in terms of number of coaches (over 1,000 coaches), Italy fourth (700 - 1,000 coaches). In UK, the rough estimate of about 7,500 business coaches means an average of 1 business coach per 8,000 inhabitants, which is the highest density in the whole EU (second highest in the world). In Germany, the estimated number of about 5,000 business coaches means 1 coach per 16,500 inhabitants, which is still one of the highest densities worldwide.

In contrast, only about 3 - 4% of all EU coaches (approximately 650) are based in the area of the former communist countries (though these comprise around 20% of the EU inhabitants).

Overall, there is a clear West-East and a slight North-South divide in the development of coaching in the European Union (as there is also in Europe overall). The Anglo region, the Founder Countries of the European-Community and Scandinavia, have a 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 clearly reflect this European diversity as well as the fact that coaching in the EU, while progressing steadily, is still work in progress:

- In 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.
- In 13 EU countries coaching is far advanced towards becoming a real profession in terms of accreditation, professional coaching bodies, code of ethics, etc. (10 EU countries: not advanced; 4 EU countries: undecided).
- The use of supervision is widely spread in 7 EU countries (13: not widely spread; 7: undecided).
- In 4 EU countries a directive coaching approach is prevailing today (Greece, Ireland, Latvia, Portugal). In 9 EU countries a non-directive approach predominates. (14 : undecided)

- The concept of coaching cultures is quite well known and widely used in 10 EU countries already; in 11 EU countries it is still hardly or not known at all. (6: in between)
- Depending on each country, there are different local characteristics and preferences in the way coaching is understood and delivered.

In terms of the stages 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 pre-introduction phase. Only in one EU country (Netherlands) is the coaching market already starting to reach maturity. In none of the 27 EU countries is coaching in decline.

3 EU candidate countries

In the three EU candidate countries (Croatia, Macedonia, Turkey) coaching is still in its infancy with only about 50 professional business coaches altogether.

11 Non EU countries

Outside the EU the situation is not homogenous: for example in Moldova and Ukraine the number of coaches is extremely small, whereas in Russia it is already more advanced (100) - and in Norway (200) and Switzerland (300-500) you find highly developed coaching industries.

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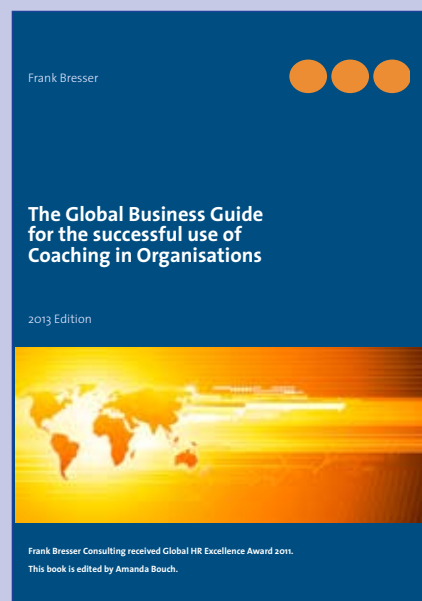
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5 . NORTH AMERICA



N O R T H A M E R I C A

16 covered countries (in alphabetical order):

Belize
Canada
Costa Rica
Cuba
Dominican Republic
El Salvador
Guatemala
Haiti
Honduras
Jamaica
Mexico
Nicaragua
Panama
Puerto Rico
Trinidad & Tobago
USA

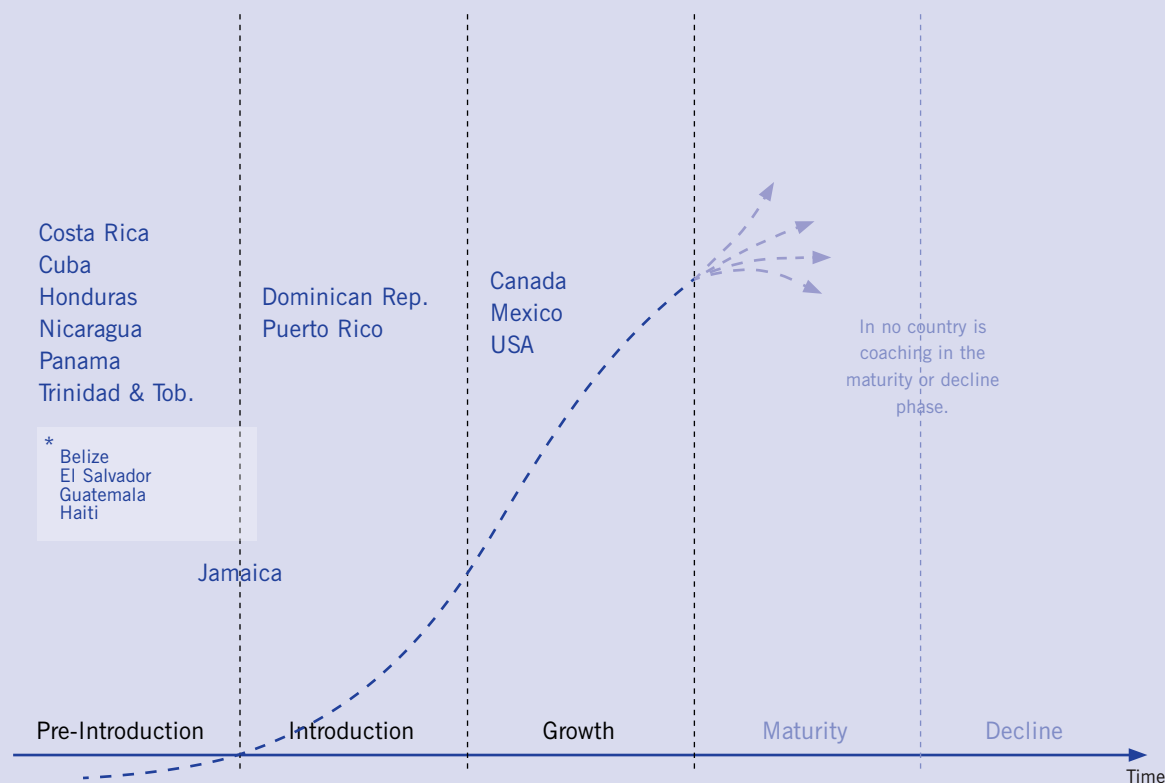


Figure: Current product-life-cycle stage of coaching in North America

* = countries in the pre-introduction phase and possibly early introduction

5.1 OVERVIEW

There are at least 12,300 business coaches operating in North America.

USA and Canada comprise around 11,600 business coaches, Mexico another 600. So in all Central America and the Caribbean, there are only 100 to 150 business coaches.

USA, accommodating about 10,000 business coaches (minimum), is the country with the highest number of coaches in the world in terms of absolute coach figures. Canada is the 6th (with at least 1,600 coaches).

The density of coaches on the whole continent is 1 coach per 43,000 inhabitants. In Northern America (USA and Canada) it is 1:29,000 (which is the same as the European Union).

There is an extreme North-South divide in the development of coaching within North America. USA and Canada have highly advanced coaching industries, whereas the whole of Central America is in the pre-introduction phase, and in the Caribbean few coaches are operating. Coaching in Mexico is located somewhere in between the two poles.

The following findings illustrate this further:

- In USA, Canada, Mexico and Puerto Rico (which is a country associated with the USA) coaching is widely accepted and used as a business tool. In all the other 12 countries, it is not. No country reports undecided.
- In Canada, USA and Mexico, coaching is in the growth phase. In 10 countries (including also all Central America) it is still in the pre-introduction phase (no coaching industry could be identified). In three other countries (Puerto Rico, Dominican Republic and partly in Jamaica) coaching has entered the introduction phase. (see figure above)
- In USA, Canada and Puerto Rico coaching is well advanced towards becoming a profession. In all others, it is clearly not, not even in Mexico.
- There are well-developed professional coaching associations in USA and Canada, but coaching bodies are absent in Central America and the Caribbean. Mexico is in between: coaching associations are already emerging, but these haven't yet been able to establish professional standards successfully in the market and take coaching as a profession to the next level in the country.
- The coaching culture concept is well known and used in USA. This is partly true in Canada and Puerto Rico.

However, in Mexico, the concept is only slightly used. In the remaining 11 countries, it is not known (at all).

- There is no prevailing coaching style in North America, the whole range from directive to non-directive coaching can be found. Interestingly, coaching in USA and Mexico is mostly non-directive, whereas it is undecided in Canada. Depending on each country, there may be many different local characteristics and preferences in the way coaching is understood and delivered.
- A typical coaching feature in both USA and Canada is a high emphasis on the (self-directed) role of the individual. Additionally a lot of remote coaching (usually by telephone) as opposed to face-to-face coaching is taking place in the north.
- In Central America, while 1:1 coaching is indeed in its infancy, in Honduras and Costa Rica coaching is emerging as a tool of group facilitation (group coaching) in multinational organisations.
- The use of supervision is widely spread only in USA, not for example in Canada and Mexico.

5.2 MAIN THEMES

Let us now have a closer look at the key coaching aspects examined in the Global Coaching Survey one-by-one (see next pages).



a Acceptance and use of coaching

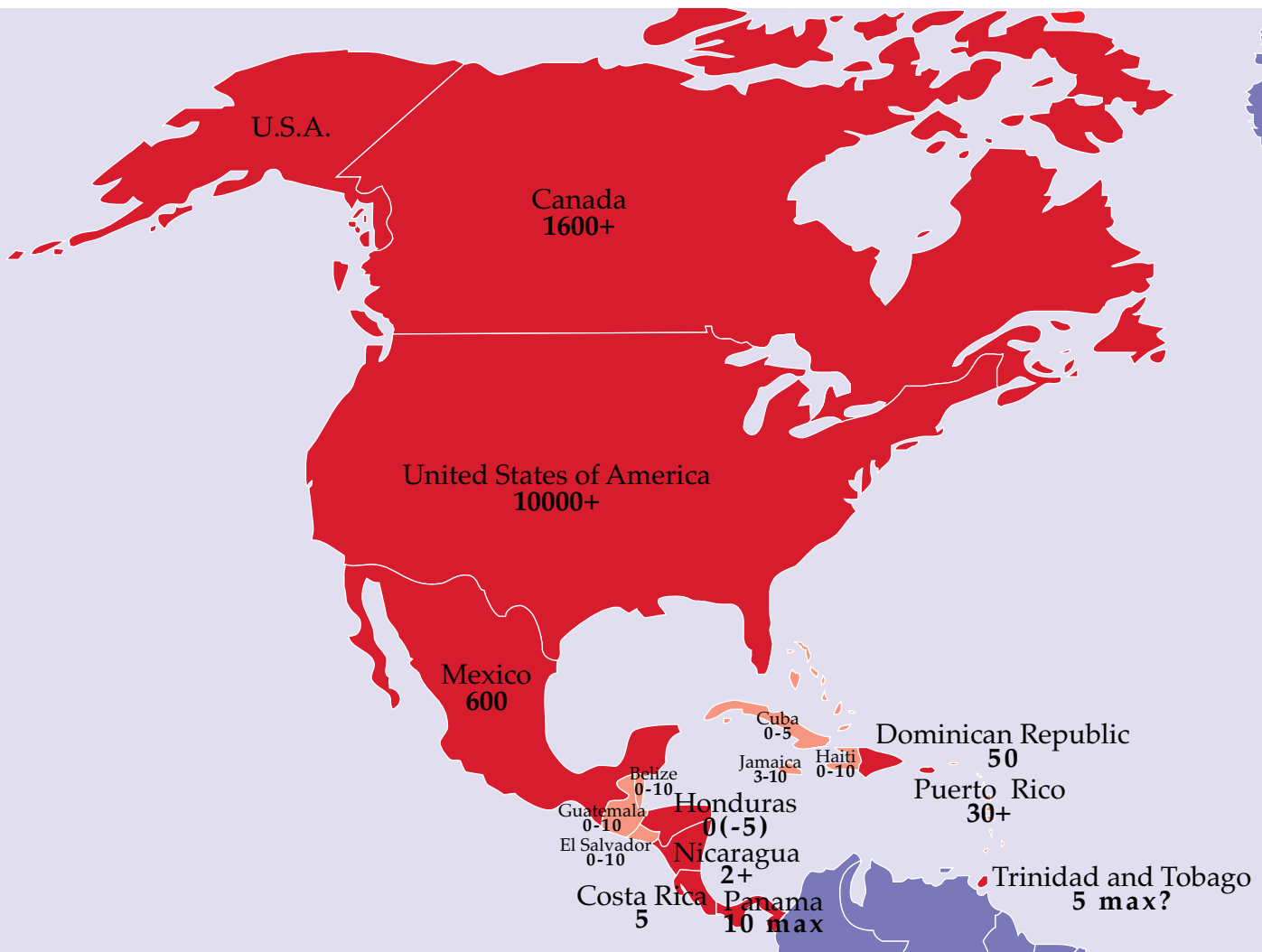
Question asked:

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

NORTH AMERICA		
++	Agree strongly	3
+	Agree	1
o	Undecided	-
-	Disagree	4
--	Disagree strongly	4
-- / -	countries where it is unclear whether it is "disagree" or "strongly disagree"	4
Total		16

There is a clear North-South divide in the development of coaching in North America. Only in the most Northern countries (US, Canada and Mexico) plus Puerto Rico (which is a country associated with the USA), is coaching widely (or very widely) accepted and used as a business tool. In all the other 12 countries, it is not. (In no single country of these, this is even undecided.)

Canada	++
Mexico	++
USA	++
Puerto Rico	+



b Number of professional business coaches

Question asked:

How many professional one-to-one business coaches are there in your country?

There are at least 12,300 business coaches operating in North America.

However, USA and Canada comprise around 11,600 business coaches, Mexico another 600. So in all Central America and the Caribbean, there are only 100 to 150 business coaches.

The US with 10,000 business coaches minimum is the country with the highest number of coaches in the world in terms of absolute coach figures. Canada is the 6th (with at least 1,600 coaches). As was said, these numbers are only minimum figures.

NORTH AMERICA	
Number of coaches	12300 + (only Can + US: 11600 +)
Percentage of coaches worldwide	about 30% (28,3%) (only Can + US: 26,7%)
Percentage of world population	8% (only Can + US: 5%)
Density of coaches (1 Coach per number of inhabitants)	43.000 max (only Can + US: 1 : 29.000)

The figures in the map generally include all coaches offering business coaching – no matter whether they do this full or part time, with or without being accredited as a coach, as a member of a coaching association or not. Not included in the numbers are generally managers/leaders/consultants just doing their job in a coaching style.

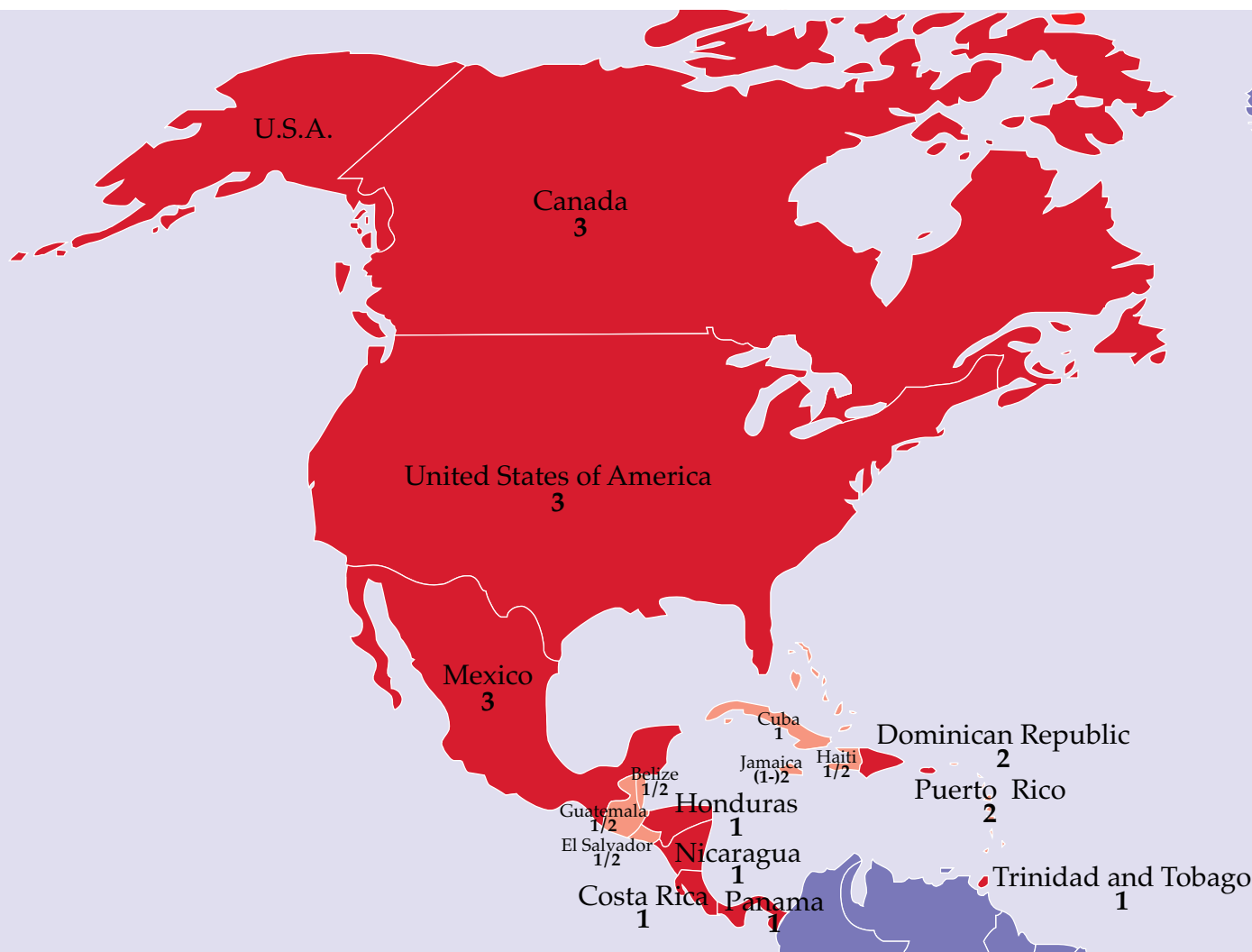
Countries with the highest numbers of business coaches:

1.	USA	10,000 +
2.	Canada	1,600 +
3.	Mexico	600
4.	Dominican Republic	50
5.	Puerto Rico	30 +

The density of coaches on the whole continent is 1 coach per 43,000 inhabitants. In Northern America (USA and Canada) it is 1 : 29,000 (which is the same as the European Union).

Countries with the highest densities of coaches:

1.	Canada	1 : 20,000
2.	USA	1 : 30,000 minimum
3.	Puerto Rico	1 : 133,000 minimum
4.	Mexico	1 : 180,000
5.	Dominican Republic	1 : 198,000



C Phase of coaching in its product life cycle

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?

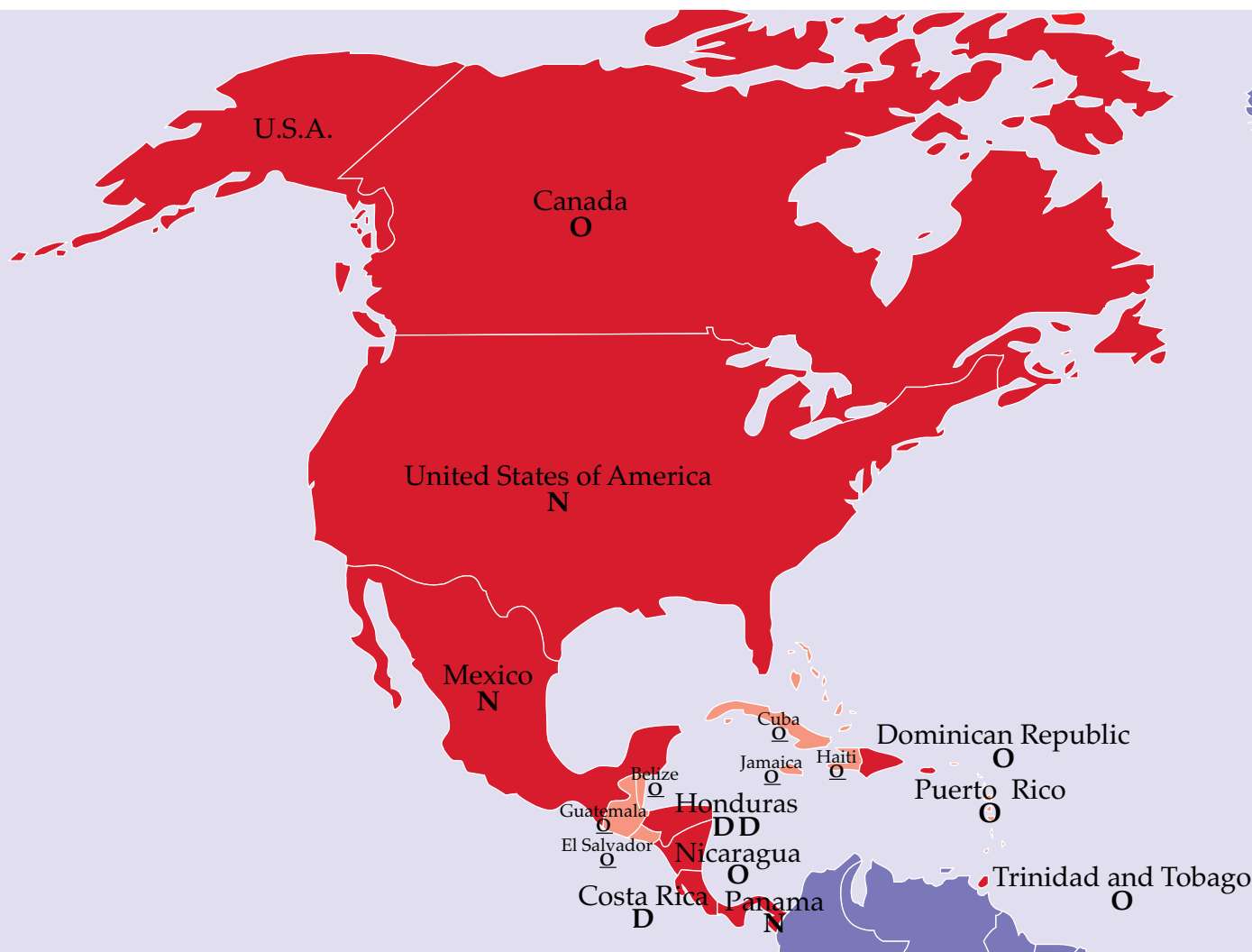
NORTH AMERICA		
1 Pre-introduction	6	4**
2 Introduction	3*	
3 Growth	3	
4 Maturity	-	
5 Decline	-	
6 Relaunch	-	
Total	16	

* = one of these is in between 1 and 2 (1-2)
 ** = countries either in the pre-introduction phase or maximum in the introduction phase (which one cannot be said with certainty from outside)

In Canada, US and Mexico, i.e. in the Northern part of the continent, coaching is in the growth phase. In 10 countries (including also all Central America) it is still in the pre-introduction phase (no coaching industry could be identified). In three other countries (Puerto Rico, Dominican Republic and partly also in Jamaica) coaching has entered the introduction phase. (also see figure on p. 130)

Countries in the growth or introduction phase:

Canada	3	Dominican Republic	2
Mexico	3	Puerto Rico	2
USA	3	Jamaica	(1 -) 2



d Directive /non-directive coaching approach

Question asked:

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

There is no prevailing coaching style as such – the whole range from directive to non-directive coaching can be found in North America. Interestingly, coaching in the US and Mexico is rather non-directive, whereas this is undecided in Canada.

All countries where the question is not seen as undecided:

Mexico	N	Costa Rica	D
Panama	N	Honduras	DD
USA	N		

NORTH AMERICA		
DD	Highly directive	1
D	Directive	1
O	Undecided	5
O	Undecided*	6
N	Non-directive	3
NN	Highly non-directive	-
Total		16

*O = undecided because there is no visible coaching industry in the country yet, that could be identified from outside

e Local characteristics of coaching

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)?

There is an extreme North-South divide in the development of coaching within North America. USA and Canada have highly advanced coaching industries, whereas the whole of Central America is in the pre-introduction phase, and in the Caribbean few coaches are operating. Coaching in Mexico is located somewhere in between the two poles.

So there is definitely not *the* North American coaching approach. Depending on each country, there may be many different local characteristics and preferences in the way coaching is understood and delivered – also within each region.

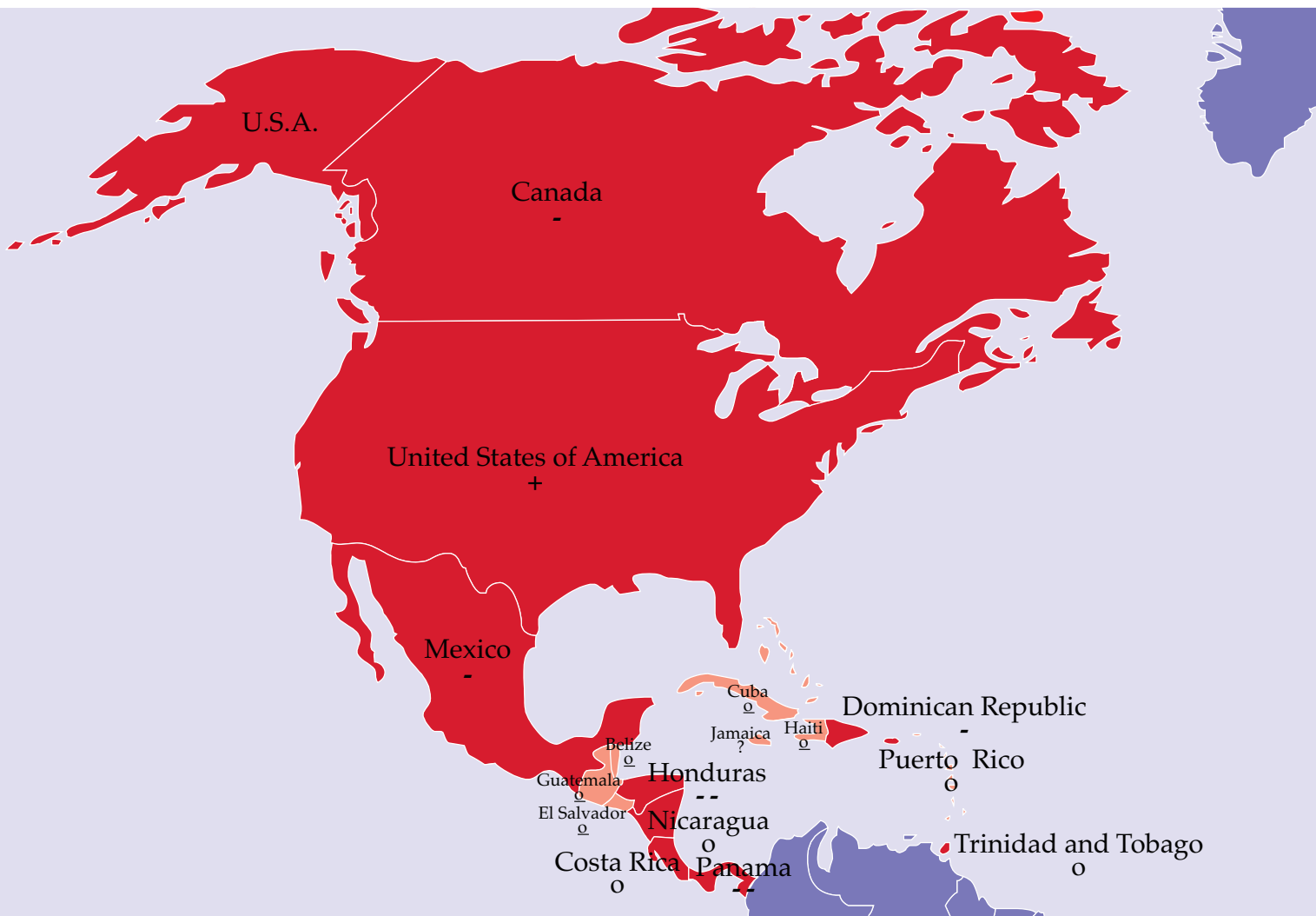
A typical coaching feature in both US and Canada is a high emphasis on the (self-directed) role of the individual. Additionally a lot of remote coaching (usually by telephone) as opposed to face-to-face coaching is taking place in the north.

In Central America, while 1 : 1 coaching is indeed in its infancy, in Honduras and Costa Rica coaching is emerging as a tool of group facilitation (group coaching) in multinational organisations.

The following table provides an overview of the answers given in each country (completed by our own findings where needed). It may serve you as a source to look up your specific countries of interest.

Belize	Business coaching has not yet visibly developed.
Canada	Confidentiality of the coaching relationship from colleagues and even HR is important. Coaching is likely to be off site.
Costa Rica	Coaching is rarely used and in a very, very early stage of development. Those who use it, expect it also to include some consulting. Basically, the only people who know about it are the executives of global companies based in the US and UK who have learned about it from their head offices. Executives use one-to-one coaching exclusively, due to status and confidentiality. There is also a form of group coaching - mainly facilitation and motivational - which is generally used with larger groups such as marketing or sales teams.
Cuba	Business coaching has not yet visibly developed.
Dominican Republic	Because it is not yet well known, coaching might be perceived not as a developmental process, but as an intervention to use when something is “wrong”.
El Salvador	Business coaching has not yet visibly developed.
Guatemala	Business coaching has not yet visibly developed.
Haiti	Business coaching has not yet visibly developed.

Honduras	Coaching is more a facilitation subject in international companies based in Honduras. At the individual level, there is no information on coaching.
Jamaica	Coaching hasn't yet significantly developed, but is starting to be slightly visible. There is at least one provider of "executive and performance coaching services", but it is not clear how successful and active this provider is. There are also at least two members of an international coaching association, but it is not clear whether and how active these are in business coaching at all. (Several attempts to contact the three remained unanswered.)
Mexico	It is important to have a reference framework, a clear methodology and structured coaching process, awareness of cultural differences and the ability to demonstrate/ show deliverables. Coaching in corporations actually started to grow since 2006.
Nicaragua	There is currently no market for coaching in Nicaragua. Companies do not buy this type of services.
Panama	Awareness of cultural issues concerning business in Panama is helpful.
Puerto Rico	It seems companies typically hire US consultants as coaches. However, in the past 5 years a new awareness of the coaching profession in the country has emerged, making companies also increasingly look for local coaches since.
Trinidad & Tobago	Coaching is not widely known and available in Trinidad and Tobago so far.
USA	<p>There is a significant amount of virtual coaching (usually by telephone) as opposed to face-to-face coaching which is the predominant method found in other regions of the world.</p> <p>Another aspect to note is that the client-coach relationship is co-created as a collaborative partnership with the client directing the focus of the coaching. The coach does not control what the client focus or objectives are.</p> <p>The ICF understanding/definition of coaching is non-directive. Directive relationships fall more into the category of consulting. Some coaches also serve as consultants which would create a blended relationship with the client.</p> <p>Supervision is becoming more significant in the USA and will most likely become standard practice within the foreseeable future.</p>



f Use of supervision by coaches

Question asked:

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

The use of supervision is widely spread only in the US. In Canada and Mexico for example, it is not. In the countries where this is undecided, this is mainly because no visible coaching industry has developed yet at all.

NORTH AMERICA		
++	Agree strongly	-
+	Agree	1
o	Undecided	5*
o	Undecided**	5
-	Disagree	3
--	Disagree strongly	2
Total		16

* = one of these is "?"

** o = undecided because there is no visible coaching industry in the country yet, that could be identified from outside



NORTH AMERICA		
++	Agree strongly	2
+	Agree	1
0	Undecided	-
-	Disagree	2
--	Disagree strongly	6
--/-	countries where it is unclear whether it is "disagree" or "strongly disagree"	5
Total		16

g Coaching on its way to becoming a real profession

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.)?

In the US, Canada and Puerto Rico (which is a country associated to the US), coaching is already far advanced on its way to becoming a profession. In all others, it is clearly not – not even in Mexico. The strong north-south divide in the development of coaching is here once again very evident.

While there are highly advanced professional coaching associations in the US and Canada (national and international ones like ICF, IAC, WABC), coaching bodies are totally missing in Central America and the Caribbean. Mexico is somewhere in between: coaching associations are in fact already emerging, but these haven't yet been able to establish professional standards successfully in the market and take coaching as a profession to the next level.

The 3 countries where coaching is highly advanced as a profession:

Canada	+ +
USA	+ +
Puerto Rico	+

Follow-up question:

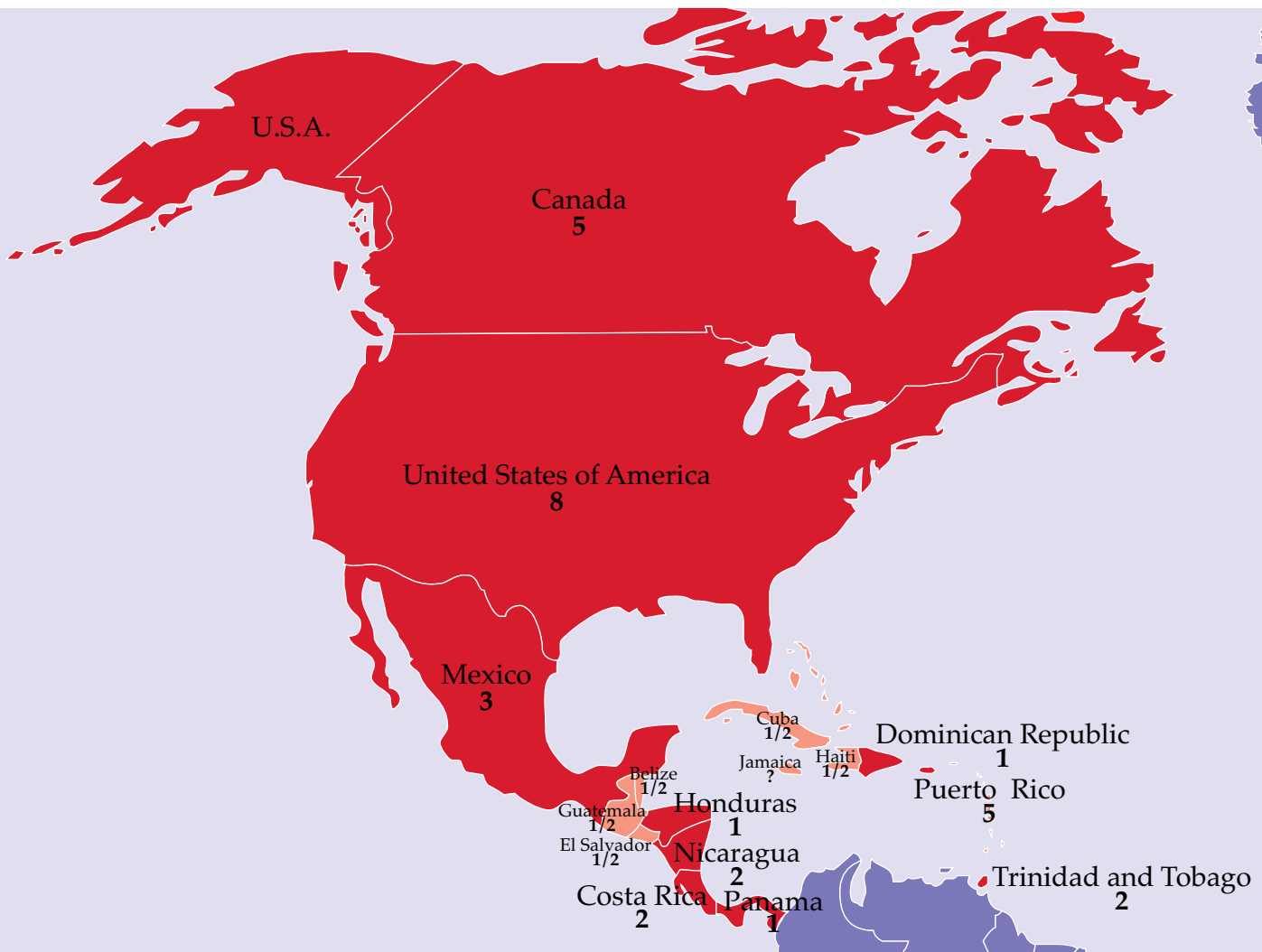
“Explain your answer to the previous question”

Results:

The following table provides an overview of the answers given in each country (completed by our findings where needed). It may serve you as a source to look up your specific countries of interest.

Belize	Business coaching has not yet visibly developed.
Canada	Membership in ICF is high. Most are in the process of obtaining their credential. 398 coaches are already credentialed. [Professional coaching bodies, codes of ethics and accreditation are highly developed.]
Costa Rica	There are barely any certified coaches. Recently there has been a lot of activity of institutes giving coaching diplomas after a 3 day or one week seminar. Clients do not quite understand what coaching is about. And with the number of informal coaches around, there is even more confusion. For example, some schools refer to manager coaches as “directive coaches”, which is derived from being a director, but creates a lot of confusion.
Cuba	Business coaching has not yet visibly developed.
Dominican Republic	Coaching is not a well known practice and still is not widely understood. There are no formally recognized communities or training programs. Accreditation has to be completed out of the country.
El Salvador	Business coaching has not yet visibly developed.
Guatemala	Business coaching has not yet visibly developed.
Haiti	Business coaching has not yet visibly developed.
Honduras	Coaching is nearly unknown. Some companies contact coaches from abroad.
Jamaica	Coaching hasn’t yet significantly developed, but is starting to be slightly visible. There are few people involved in coaching (at least one provider of executive and performance coaching and two members of an international coaching association), but it is not clear whether and how active and successful these are in business coaching at all (several attempts to contact them remained unanswered).

Mexico	<p>There are many opportunists riding the wave of coaching, be it in the field of coach training or providing coaching services. A lot of marketing is going on. For example, some therapists, trainers etc., who haven't had a coach training, all of a sudden include coaching within their practice to become more attractive to potential customers. Or it happens coaches or coach training business owners start to call themselves "master coaches" without any credential or proof validating their claim.</p> <p>Having said that, there are also numerous people who understand, respect and promote coaching as a profession. They are putting forward the code of ethics and good practice standards and are sometimes starting chapters of international professional coaching bodies (e.g. ICF, IAC or Coachville) in Mexico. [There is also a Mexican coaching association (AMC).]</p> <p>It can be a very painstaking effort to educate the public on what coaching is and what it is not, what to expect from a coaching process, etc. There is still work to do to raise public awareness on what to ask for before hiring a coach.</p> <p>Fortunately there are already corporations asking for credentials before engaging in coaching processes. My guess is that this info will pass along human capital professionals as a result of failed coaching processes where this didn't happen.</p> <p>As coaching is a rather young profession in Mexico, there are only a handful of suitable master coaches or mentor coaches to supervise coaching practice. There is a Coaching Sistémico Community (formed out of the 140 persons trained as professional coaches in the only ICF accredited program in Mexico) that functions as an informal supervising body by sharing cases and putting forward problems found in the coaching practice.</p> <p>[There are 4 ICF Chapters, one IAC Chapter and the AMC.]</p>
Nicaragua	<p>We have tried to sell coaching services, but there is no interest in paying for this kind of service. So there seems to be no market for coaching in Nicaragua at the moment.</p>
Panama	<p>Coaching is only at the very beginning.</p>
Puerto Rico	<p>There are now at least 2 ICF approved training programs certifying coaches on the island in addition to about 3 university based programs that have included coaching in their business curriculum. [There is an ICF Chapter.]</p>
Trinidad & Tobago	<p>Coaching is not widely known or available at the present time.</p>
USA	<p>The ICF is a professional body for coaches and has a code of ethics and credentialing standards. It is also working towards ISO compliance and the establishment of a body of knowledge for the coaching profession.</p> <p>[Professional coaching bodies, certification and codes of ethics are generally highly developed in the US. What is more, the large international coaching associations based in the US (like ICF and IAC) have local as well as international chapters across the globe, which have influence on the definition and development of coaching in other continents and regions.]</p>



h Spread and use of the concept of "coaching cultures"

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)?

The coaching culture concept is well known and used in USA. This is partly true in Canada and Puerto Rico. However, in Mexico, the concept is only slightly used. In the remaining 11 countries, it is not known (at all).

Countries with 3 and more:

USA	8
Canada	5
Puerto Rico	5
Mexico	3

NORTH AMERICA		
1	not at all	3
1/2*		5
2		3
3		1
4		-
5		2
6		-
7		-
8		1
9		-
10	very much	-
Answer "?"		1
Total		16

*1/2 = either 1 or 2, but very low

5.3. GEOGRAPHICAL AREAS WITHIN NORTH AMERICA

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

a. Northern America (Canada and USA)

The coaching industry in US and Canada is one of the most developed in the world. Coaching is very widely accepted and used as a business tool, in the growth phase and very far advanced in becoming a profession in both countries.

At least every fourth business coach of the world is based in either of these two countries, while these only represent 5% of the world population. The US with 10,000 business coaches minimum is the country with the highest number of coaches in the world in terms of absolute coach figures. Canada is the 6th (with at least 1,600 coaches). These numbers are only minimum figures.

The density of coaches in Northern America is 1 coach per 29,000 inhabitants (which, by the way, is exactly the same figure as the one for the European Union).

There are highly advanced professional coaching associations, local and international ones alike. For example, the ICF and partly the IAC (both based in the US) have local as well as international chapters across the globe, which have influence on the definition and development of coaching in other continents and regions.

However, there are also differences between the US and Canadian coaching market. Firstly, coach supervision is widely used in the US, in Canada it is not. Secondly, coaching in the US is predominantly non-directive, whereas in Canada the question is undecided whether directive or non-directive coaching is prevailing.

The coaching culture concept is well known and widely used in the US. This is also true in Canada, but less strongly.

A typical coaching feature in both countries is a high emphasis on the (self-directed) role of the individual. Additionally a lot of remote coaching (usually by telephone) as opposed to face-to-face coaching is taking place in the north. Finally, business and life coaching are sometimes not that clearly distinguished as may be the case in other regions of the world.

b. Central America (Belize, Costa Rica, Guatemala, El Salvador, Honduras, Nicaragua, Panama)

This region, without exception, is an undiscovered area in terms of one-to-one coaching and absolutely contrasts the highly advanced coaching industries in the Northern part of the continent. All countries are in the pre-introduction phase with maximum 10 business coaches in any country if at all. Attempts to sell 1:1 coaching services in this region have not succeeded in a way that something sustainable could emerge. Interestingly, in Honduras and Costa Rica, coaching is sometimes used as a tool of group facilitation (group coaching) in multinationals.

c. Bridge in between: Mexico

Coaching in this country is again, like in the US and Canada, very widely accepted and used as a business tool. The coaching market (600 business coaches) is also in the growth phase. However, coaching isn't yet far advanced on its way to becoming a real profession in Mexico which is a clear difference to the two Northern American states. The coaching market hasn't yet established professional and transparent standards.

So coaching in Mexico is somewhere in between Northern and Central America.

The prevailing coaching-style in Mexico is non-directive. Coach supervision and the coaching culture concept currently don't play a major role in the country.

d. The Caribbean (e.g. Cuba, Dominican Republic, Jamaica, Trinidad & Tobago, Puerto Rico)

Only in Puerto Rico (30 business coaches minimum), is coaching widely accepted and used as a business tool and far advanced in becoming a profession. However, this is no real surprise, as the country is associated with the USA. The coaching culture concept is quite well known in Puerto Rico.

The local market, though, is still only in the introduction phase, as for a long time, coaches from abroad had been contracted by companies rather than local coaches.

Coaching in the Dominican Republic is worth mentioning. It is in the introduction phase here, and already about 50 business coaches are operating in the country.

Apart from these two exceptions, you may encounter single coaching providers also in other countries (e.g. Jamaica), but it seems no real visible coaching industry has actually developed there.

New Book Publication:



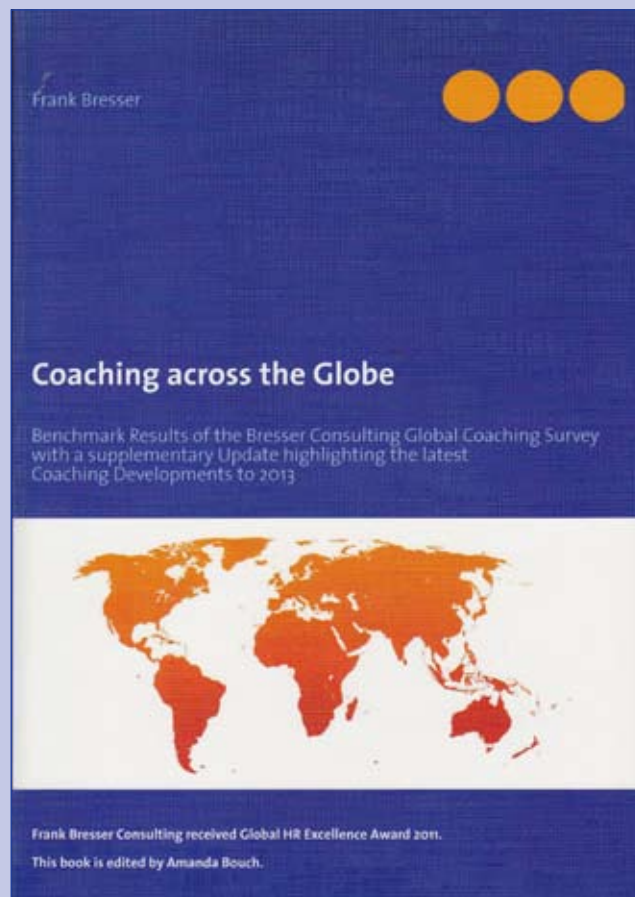
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6 . S O U T H A M E R I C A



Full colours = participating countries
Light colours = additionally researched countries

SOUTH AMERICA

12 covered countries (in alphabetical order):

Argentina
Bolivia
Brazil
Chile
Colombia
Ecuador
Guyana
Paraguay
Peru
Surinam
Uruguay
Venezuela

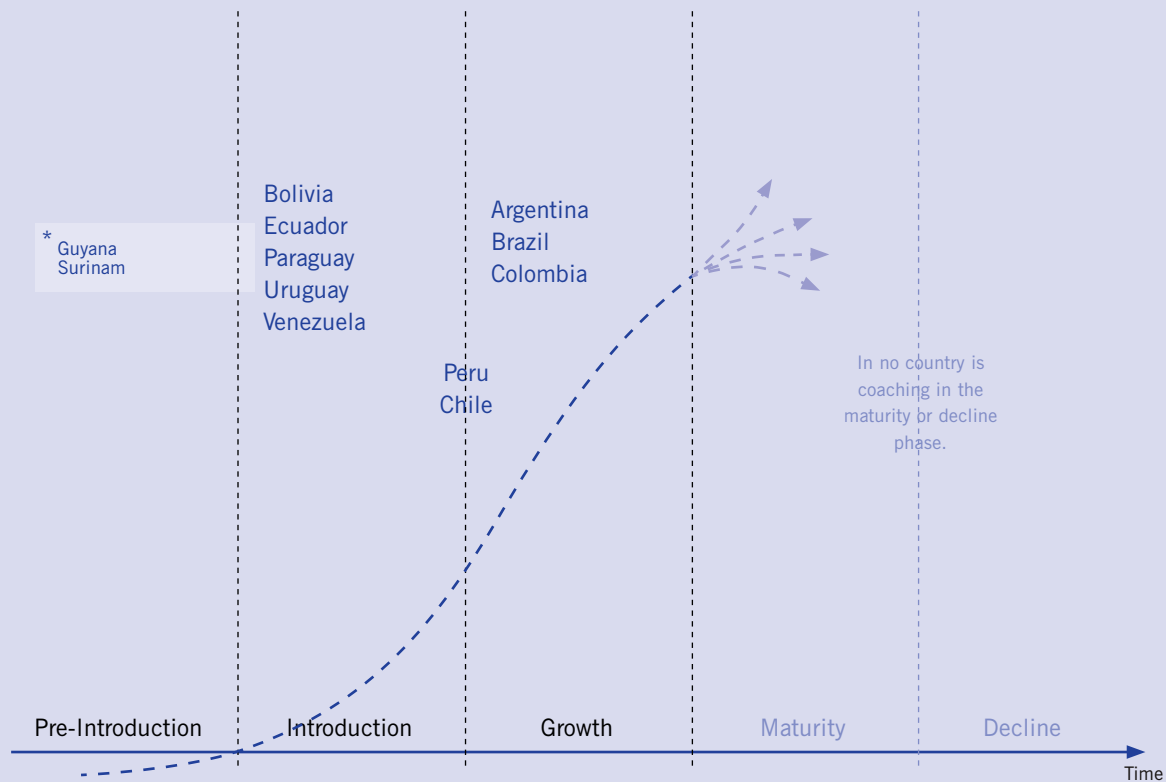


Figure: Current product-life-cycle stage of coaching in South America

* = countries in the pre-introduction phase and possibly early introduction

6.1 OVERVIEW

There are about 2,200 - 2,300 business coaches operating in South America.

Comparing this with other regions of the world, the number is quite low, in particular given the overall high development of coaching on the continent.

The density of coaches in South America is 1 coach per 170,000 inhabitants. Interestingly, while Brazil is the country with the highest number of business coaches at 1,000, due to its large population its density of coaches is lower (1 : 195,000) than the continent average. The highest density of coaches on the continent is in Columbia at 1 coach per 88,000 inhabitants.

South America is generally quite advanced in the development of coaching which is illustrated by the following findings:

- In Argentina, Colombia and Peru, coaching is already widely accepted and used as a business tool. In another 6 countries, this is undecided. In 3 (comparatively small) countries coaching is not much used.
- In 5 of the 12 countries - Argentina, Brazil, Colombia, Peru and Chile - coaching is in the growth phase. In

another 5 it is in the introduction phase. In 2 countries, business coaching hasn't yet visibly developed.

- In Argentina, Chile and Peru, coaching is well advanced towards a profession. In 7 countries it is not. In two this is undecided. (see figure above)
- A characteristic of coaching in South America is the high number of countries having a national coaching association (e.g. Argentina, Brazil, Chile, Peru). This suggests that coaching bodies are actively shaping the development and understanding of coaching in a more local way. International coaching associations are also present on the continent.
- The South American coaching approach doesn't exist. Depending on each country, there are many different local characteristics and preferences in the way coaching is understood and delivered. Coaching is not predominantly directive on the continent; on the contrary, there is a slight slant towards non-directive coaching.
- Despite coaching being already quite advanced in a number of countries, the number of business coaches is low

when compared with developed coaching markets on other continents.

- There are sometimes cultural reservations about coaching (e.g. conservative style, authoritarian attitude, resistance, expectation of a directive coach) that need to be overcome (e.g. in Uruguay, Ecuador, Brazil, Chile).
- Venezuela is the only country in South America where coach supervision is widely spread. This is mainly due to the fact that key providers of coach training in the country strongly promote it. Apart from this, supervision doesn't play a major role in South America.
- The coaching culture concept is well known and widely used in Argentina. This is slightly true in Brazil, Uruguay, Venezuela, Colombia and Chile, but in the remaining 6 countries, the concept is not known.

6.2 MAIN THEMES

Let us now have a closer look at the key coaching aspects examined in the Global Coaching Survey one-by-one (see next pages).



SOUTH AMERICA		
++	Agree strongly	2
+	Agree	1
o	Undecided	6
-	Disagree	1
--	Disagree strongly	-
--/-	countries where it is unclear whether it is "disagree" or "strongly disagree"	2
Total		12

a Acceptance and use of coaching

Question asked:

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

In Argentina, Colombia and Peru, coaching is already widely accepted and used as a business tool. In another 6 countries, this is undecided, and in three it is not.

Countries with high acceptance and use of coaching:

Argentina	++
Colombia	++
Peru	+



SOUTH AMERICA	
Number of coaches	2200 - 2300
Percentage of coaches worldwide	about 5% (5,2%)
Percentage of world population	6%
Density of coaches (1 Coach per number of inhabitants)	1 : 170.000

The figures in the map generally include all coaches offering business coaching – no matter whether they do this full or part time, with or without being accredited as a coach, as a member of a coaching association or not. Not included in the numbers are generally managers/leaders/consultants just doing their job in a coaching style.

b Number of professional business coaches

Question asked:

How many professional one-to-one business coaches are there in your country?

There are about 2,200 - 2,300 business coaches operating in South America.

When comparing this with other continents, the number is quite low given the fairly high development of coaching on the continent. This phenomenon could be a characteristic of Ibero-American countries in general, as the same can also be observed in Portugal and Spain in Europe.

Countries with the highest numbers of business coaches (50 and more):

1. Brazil	1,000
2. Colombia	500
3. Argentina	300
4. Chile	150 - 200
5. Peru	120
6. Bolivia	60 - 70

The density of coaches in South America is 1 coach per 170,000 inhabitants. Interestingly, while Brazil is the country with the highest number of business coaches (1,000), due to its large population its density of coaches is lower (1 : 195,000) than the continent average. The highest density of coaches on the continent is in Columbia at 1 coach per 88,000 inhabitants.

Countries with the highest densities of coaches:

1. Colombia	1 : 88,000
2. Chile	1 : 96,000
3. Argentina	1 : 132,000
4. Bolivia	1 : 153,000
5. Brazil	1 : 195,000
6. Peru	1 : 233,000



SOUTH AMERICA		
1 Pre-introduction	-	2**
2 Introduction	5	
3 Growth	5*	
4 Maturity	-	
5 Decline	-	
6 Relaunch	-	
Total		12

* = two of these are in between introduction and growth (2-3)
 ** = countries either in the pre-introduction phase or maximum in the introduction phase (which one cannot be said with certainty from outside)

c Phase of coaching in its product life cycle

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?

In 5 of the 12 countries - Argentina, Brazil, Colombia, Peru and Chile - coaching is in the growth phase. In another 5 it is in the introduction phase. In 2 countries, business coaching hasn't yet visibly developed (no coaching industry could be identified from outside). (also see figure on p. 148)

Countries where coaching has already entered the growth phase:

Argentina	3	Peru	2 - 3
Brazil	3	Chile	2 (- 3)
Colombia	3		



SOUTH AMERICA		
DD	Highly directive	1
D	Directive	-
O	Undecided	6
Q	Undecided*	2
N	Non-directive	3
NN	Highly non-directive	-
Total		12

*O = undecided because there is no visible coaching industry in the country yet, that could be identified from outside

d Directive/non-directive coaching approach

Question asked:

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

There is no prevailing coaching style as such. In Brazil, Argentina and Colombia with about 80% of all business coaches of South America, the question whether coaching is predominantly directive or non-directive is undecided. However there is a slight slant towards non-directive coaching, as coaching in three countries (Chile, Paraguay, Venezuela) is predominantly non-directive and only in one is it directive (very directive: Ecuador).

Countries where this question is not seen as undecided:

Ecuador	DD
Chile	N
Paraguay	N
Venezuela	N

e Local characteristics of coaching

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)?

There is not *the* South American coaching approach. Depending on each country, there are many different local characteristics and preferences in the way coaching is understood and delivered. (Coaching is also not predominantly directive on the continent, as some may expect.)

However, what is common is that, despite coaching being already quite far advanced in a number of countries, the number of business coaches is overall low, when compared with developed coaching markets in other continents.

Another characteristic of coaching in South America is the high number of countries having a national coaching association (e.g. Argentina, Brazil, Chile, Peru). This suggests that coaching bodies are actively shaping the development and understanding of coaching in a more local way. International coaching associations are also present on the continent.

In addition, there are sometimes cultural reservations about coaching (e.g. conservative feelings, authoritarian attitude, resistance, expectation of a directive coach) that need to be overcome (e.g. in Uruguay, Ecuador, Brazil, Chile).

The following table provides an overview of the answers given in each country (completed by our own findings where needed). It may serve you as a source to look up your specific countries of interest.

Argentina	Today, there is a very high openness towards coaching. In principle, there is no recommendation to make specifically.
Bolivia	In general, the same things should be taken into account as in other countries. However, it highly depends on the type of training and the segment that is being directed.
Brazil	Brazil is a big country with some regional differences. In the southern part of the country, there is a clear European tradition. Central and northern regions tend to remain a bit paternalistic and authoritarian – not very receptive to coaching. Especially this is the case when it is about executive and business coaching of male coachees by female coaches.
Chile	People are barely acquainted with coaching, can be distrustful about its benefits/results and be reluctant about giving personal information. So coaches must work hard enough to gain the confidence from clients. However, coaching is finding its way in the business environment and we foresee a sharp increment of the usage of coaching in the following years.
Colombia	Specificities to have in mind depend more on the individual client/firm than the country.

Ecuador	<p>The expectation is to have a highly directive coach. This is probably due to the lack of understanding about coaching and the fact that it is mostly consultants that act as coaches. There is also a cultural component that people tend to expect to be told what to do.</p> <p>One-to-one coaching is very limited. And if it is done, it takes place basically in multinational organizations. Most of what is done in coaching is offered as a coaching training program to develop leadership skills.</p> <p>Generally, people prefer to have coaching sessions in person (face to face).</p>
Guyana	Business coaching has not yet visibly developed.
Paraguay	The use of coaching in Paraguay is certainly new. It is a discipline that is not yet widely practiced in organisations.
Peru	<p>Most of the coaches are not real professionals in terms of coaching. At the most, they are psychologists – but they often do not use the coaching techniques properly.</p> <p>Just a very small group of people is interested in paying coaches themselves on a private basis. Most want their companies to pay for it.</p>
Surinam	Business coaching has not yet visibly developed.
Uruguay	<p>There is still very low awareness of coaching, and coaching is developed and being introduced as a new concept. Some international companies do have some executive coaching from their parent companies.</p> <p>As in many other countries, education and trial sessions (etc.) are ways to gain people's confidence and achieve a clear differentiation between coaching and therapy. Cultural and local matters do have their importance (e.g. resistance to change, conservative feelings). Uruguay is a very conservative country, and changing beliefs or habits may not be easily accepted.</p> <p>The coaches have mainly been formed/trained in Argentina. Now, that there are some local coaches (also doing courses), they are in the process of formalizing their community around an ICF or IAC code of ethics. Existing coaches are focussing on one-to-one coaching, as it is the individual choice of the coachee and doesn't make it necessary for the person to show intimacy to others.</p>
Venezuela	Coaching is developing as a process and it looks it will grow further in Venezuela. Coaches consider this as a good opportunity to also develop coaching cultures in organizations.



SOUTH AMERICA		
++	Agree strongly	1
+	Agree	-
o	Undecided	2
o	Undecided*	2
-	Disagree	4
--	Disagree strongly	3
Total		12

*o = undecided because there is no visible coaching industry in the country yet, that could be identified from outside

f Use of supervision by coaches

Question asked:

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

Venezuela is the only country in South America where coach supervision is widely spread. This is mainly due to the fact that key providers of coach training in the country are actively promoting it.

Apart from this, supervision doesn't play any major role in South America.



SOUTH AMERICA		
++	Agree strongly	1
+	Agree	2
o	Undecided	2
-	Disagree	4
--	Disagree strongly	1
- / -	countries where it is unclear whether it is "disagree" or "strongly disagree"	2
Total		12

g Coaching on its way to becoming a real profession

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.)?

In Argentina, Chile and Peru, coaching is far advanced on its way to becoming a profession. In 7 countries it is not. In two this is undecided.

However, a striking point about coaching in South America remains the high number of countries having a national coaching association (e.g. Argentina, Brazil, Chile, Peru). This suggests that coaching bodies are actively shaping the development and understanding of coaching in a more local way. International coaching associations are also present on the continent.

Interestingly, national coaching associations and international chapters are increasingly working together in the Ibero-American region. A supra-regional coaching federation called FIAC (Federación Iberoamericana de Asociaciones de Coaching) is a project underway to strengthen the links between Spanish-speaking coaching associations. The first Ibero-American coaching conference will take place in Buenos Aires this August (2009) already.

Coaching becoming a real profession:

Argentina	+ +	Uruguay	o
Chile	+	Venezuela	o
Peru	+		

Follow-up question:

“Explain your answer to the previous question”

Results:

The following table provides an overview of the answers given in each country (completed by our findings where needed). It may serve you as a source to look up your specific countries of interest.

Argentina	We are currently working towards achieving an official registration of coaching as a profession, recognized by the state. [Well developed coaching bodies exist, e.g. AAPC and an ICF Chapter.]
Bolivia	One-to-one coaching is new in our country. Since it is not well known, more practice and information is needed.
Brazil	ABRACEM is the only real professional coaching body with a code of ethics in Brazil. All others are rather businesses selling coach training programs, some of them offering so-called “international certifications” of other businesses outside Brazil. Many individuals who call themselves “coaches” only went through brief coach training programs (sometimes just of 8 to 16 hours length and with no selection process of any kind). Maybe there are only around 50 persons in Brazil who are real, fully qualified, full-time coaches. [Well developed coaching bodies exist, e.g. ABRACEM, four ICF Chapters.]
Chile	Coaching in this country has all the fundamentals to become a profession. There is one Chilean Coaching Association and a second acting as a chapter of ICF. Both of them have accreditation standards and a code of ethics. [There is also an IAC Chapter.]
Colombia	It is still too early to say coaching is advanced on its way to becoming a real profession. For example, clear criteria in the market to distinguish between different approaches to coaching are still missing. [There is an ICF Chapter.]
Ecuador	Coaching is a “buzz word” in Ecuador. Many business people use the term with little understanding of what it means and how it works, especially HR professionals. Many HR consultants have gone into coaching without having any specific training. Currently there aren’t any coaching associations that will look into the ethics and integrity of coaching. Very little progress has been made in the field of coaching in the last three years. While Ecuador is a country highly influenced by US business practices, it may sometimes also happen – like with coaching now – that these are not all too professionally adopted.

Guyana	Business coaching has not yet visibly developed.
Paraguay	The study of coaching must be done in other countries. You don't find any international accreditation in Paraguay.
Peru	<p>Every day, coaching is more recognized as a tool to support executives. However, as we don't have a well recognized program yet in the country, Peruvians have to travel to other countries to get their certifications. This limits coaching as a profession to a small group of people, which may delay the process of making it more widely popular as a career within the country. Also, there is a concern that the ICF is not (yet) doing a sufficient job regarding the supervision of good practices.</p> <p>[There is the Peruvian Coaching Association, APCO, an ICF Chapter and an IAC Chapter.]</p>
Surinam	Business coaching has not yet visibly developed.
Uruguay	<p>The coaches have mainly been formed / trained in Argentina. Now, that there are some local coaches (also doing courses), they are trying to formalize their community around an ICF or IAC code of ethics.</p> <p>[There is an Uruguayan Coaching Community: Comunidad de Coaching del Uruguay]</p>
Venezuela	<p>On the one hand, there are qualified people who are highly committed to coaching and living the coaching process and code of ethics. On the other hand, now that a coaching culture is growing, a lot of "fast track coaching" is also starting to take place (which may rather hinder the process towards building a real coaching culture).</p> <p>[There is a Venezuelan community for professional coaching: Comunidad Venezolana para el Coaching Profesional]</p>



SOUTH AMERICA		
1	not at all	2
1/2*		2
2		2
3		2
4		3
5		-
6		-
7		1
8		-
9		-
10	very much	-
Total		12

*1/2 = either 1 or 2, but very low

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

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)?

The coaching culture concept is well known and widely used in Argentina. This is slightly true in Brazil, Uruguay, Venezuela, Colombia and Chile, but in the remaining 6 countries, the concept is not known.

The 4 countries with the highest numbers:

Argentina	7	Uruguay	4
Brazil	4	Venezuela	4

6.3. GEOGRAPHICAL AREAS WITHIN SOUTH AMERICA

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

a. La Plata countries (Argentina, Uruguay, Paraguay)

Argentina – with 300 business coaches – has a highly developed coaching industry with national and international professional coaching bodies and can clearly be seen as the centre of the region. Coaching is very widely accepted and used as a business tool, is in the growth phase and far advanced on its way to becoming a profession in the country. The coaching culture concept is well known and used, coaching supervision doesn't play a major role.

In contrast, coaching is just in the early introduction phase and not at all advanced as a profession in Paraguay. The coaching market in Uruguay is also just emerging (introduction phase), but is a bit more advanced than in Paraguay. The numbers of coaches in both countries are generally low (around 10) and, as professional coach training is mainly only available abroad so far, a high percentage of coaches was trained in Argentina. Having said that, coaches in Uruguay are starting to offer coach training locally in the country, and a local coaching community is emerging. The coaching culture concept is also starting to get known and used in Uruguay, in Paraguay it is not at all.

The predominant coaching style in Paraguay is non-directive. In Argentina and Uruguay, this question of directive/non-directive is undecided.

b. Brazil

While Brazil is the country with the highest number of business coaches (1,000) in South America in terms of absolute coach figures, the density of coaches in the country is lower (1 : 195,000) than the average of the continent (1 : 170,000) due to its large population.

Also, many individuals who call themselves "coaches" only went through brief coach training programs (sometimes just of 8 to 16 hours length and with no selection process of any

kind). It is estimated that there are only around 50 persons in Brazil who are fully qualified, full-time business coaches.

Coaching in Brazil actually is in the growth phase, but it is not yet far advanced on its way to becoming a real profession. Coaching is only becoming accepted and used in business. However, there is already a national professional coaching association (ABRACEM) as well as at least one international one.

Brazil is a big country with some regional differences. In the southern part of the country, there is a clear European tradition. Central and northern regions tend to remain a bit paternalistic and authoritarian – not very receptive to coaching. This is especially the case when it is about executive and business coaching of male coachees by female coaches.

c. Andean countries (Ecuador, Peru, Bolivia, Chile, Colombia)

Colombia (500 business coaches) and Chile (150-200) are the two countries with the highest density of coaches in South America (1 coach per 88,000 / 96,000 inhabitants). Both have entered the growth phase. The latter is also true for Peru (120 coaches) where coaching, like in Chile, is also far advanced on its way to becoming a real profession.

Coaching is widely accepted and used as a business tool in Colombia and Peru. In the other countries this is undecided. In Ecuador, you find very few coaches (10) and a prevailing directive coaching approach, whereas it is predominantly non-directive in Chile. In Bolivia, coaching is starting to develop now (60-70 coaches, introduction phase).

Professional coaching associations – national and international ones – have, for example, already emerged in Peru and Chile.

Supervision and the coaching culture concept don't play a major role in any of the countries.

d. Venezuela, Guyana, Surinam (Countries at the Caribbean Sea)

Coaching in Venezuela (30 business coaches) is in the introduction phase, has started to be well accepted and used

as a business tool, and is advancing towards becoming a profession. The prevailing coaching style is non-directive. Interestingly, Venezuela is the only country in South America where coach supervision is widely spread (due to the fact that key providers of coach training in the country are strongly promoting it). There is also some mention of coaching cultures.

In Guyana and Surinam, in contrast, business coaching hasn't yet visibly developed – no coaching industry could be identified from outside.

Frank Bresser Consulting



Frank Bresser, M.B.A.

Mobile +49 (0)1 79 - 4 33 88 76
Email: frankbresser@bresser-consulting.com

Frank Bresser Consulting Office:

Tel. +49 (0)2 21 - 5 70 86 42
Email: info@bresser-consulting.com
Fax +49 (0)2 21 - 5 70 86 43

Postal address:
Fridolinstr. 13, 50823 Cologne, Germany

 www.frank-bresser-consulting.com

Frank Bresser is the global business expert for the successful implementation and improvement of coaching.

Supported by his worldwide team of assistant consultants, he advises companies on the effective use of coaching.

His expertise is used and put in practice successfully in organisations across the globe and has set international standards in the implementation and improvement of coaching.

III. LIST OF PARTICIPATING ORGANISATIONS/PEOPLE

We thank the following organisations/people for their readiness, time and effort to share their knowledge and support and participate in the Global Coaching Survey 2008/2009:

AFRICA

1. Algeria: MDI Consulting, Brahim Mahiout, Director
2. Botswana: Global Consult, Jowitt Mbongwe, Managing Director, Vice President of AFHRMA (African Federation of Human Resource Management Associations)
3. Egypt: Persona International, Riham El-Hawary, Director
4. Gabon: Cible Gabon, Toukam Blaise, Director
5. Kenya: Debut Image Consultants, Grace Musyoka, Chief Consultant and Coach
6. Libya: Links Enterprise Business Solutions, Omran Zbeida, PMP, Chairman, CEO
7. Morocco: Maroc Coaching (Moroccan Coaching Association), Bouchra Kadiri
8. Nigeria: Nigeria Coaches Association, Oke Lukman Abayomi
9. South Africa: Belinda Davies, Coach & Leadership Development Specialist, National President of COMENSA (Coaches and Mentors of South Africa - Association), participating in her personal capacity. COMENSA is planning to make wider research on the topic this year to get more reliable data and participate next time.
10. Sudan: Atbara Foundation for Development Consultants and Integrated Solutions, Elkhidir Elamin Mohammed, Director
11. Tunisia: Tida Bisa Developing People, Trioullier Karine, Managing Partner
12. Uganda: Coach Africa, Norah Njuba Bwaya, Managing Director

ASIA

1. Bahrain: Corporate Elevation WLL Bahrain, Angela Mulvie, HR Consultant/Executive Coach
2. Bangladesh: FutureLeaders, Quazi Ahmed, CEO

3. Cambodia: AAA Cambodia, Susanna Coghlan, Director of Training
4. China:
 - Progress-U, Charlie Lang, Managing Partner and President of the Hong Kong International Coaching Community (HHICC)
 - Enrichment Consulting and Coaching Institute, Catherine Ng, CEO (Chief Corporate Coach & Trainer) and ICF Beijing Chapter Leader
5. India: Indian Coaches Association, Muthyalapadu, Andhrapradesh, Dharanipragada Satya Murty, Mentor Coach
6. Indonesia: METAMIND Training Coaching Institute, Mariani Ng, Transformational Leadership Coach
7. Iran: Atieh Roshan Consulting, Pari Namazie, Managing Director
8. Israel: ICF Chapter Israel/Reality Creation Institute, Gil Weiner, Chapter Leader/CEO
9. Japan: Japan Coach Association, Naoko Mori (and Mrs Keiko Hirano being also ICF Japan Chapter Leader)
10. Kazakhstan: Coaching Center "Global", Assel Shalabayeva, Coach
11. Kuwait: Gulf Lead Consultancy, Raja Yousif Al-Iaho, Consultant & Executive Coach
12. Lebanon: Maria Gebran Khalife (Change Coaching Institute/Idea Integration)
13. Malaysia: Asia Pacific Alliance of Coaches (APAC), Wai K. Leong, Malaysia Representative, Kuala Lumpur; (JMC Coach Mastery; Managing Partner/Chief Coach)
14. Nepal: Devi Gurung, Aster Academy High School, Kathmandu
15. Pakistan: Asia Pacific Alliance of Coaches (APAC), Sharjeel A. Moutier, APAC Pakistan Representative (based in Paris), Trainer and Business Coach
16. Philippines: Benchmark Consulting/ICF Chapter Philippines, Julius Ordonez, Managing Director/Chapter Leader
17. Qatar: Jane Hoelker, Business Coach
18. Saudi Arabia: Management Training Institute "MTC", Mustafah Judeh, Executive Director
19. Singapore: Asia Pacific Alliance of Coaches (APAC), See Luan Foo, President

20. South Korea: Asia Coach Center/ICF Chapter Korea
Seoul, Dr. Paul Jeong, President/Chapter Leader
21. Sri Lanka: Asia Pacific Association of Coaches
(APAC), Gerald Abeyawardena, Exco Member & Sri Lanka
Representative (based in Singapore)
22. Tajikistan: ISD Consulting, Rahmat Khakulov, Director
23. Thailand: 1-2-WIN, Jean-Francois Cousin, Managing
Director
24. United Arab Emirates: Coaching and Mentoring Middle
East LLC, Joanne Simpson, Managing Director
25. Uzbekistan: Central Asia Consulting Group,
Hilola Suleymanova, Partner
26. Vietnam: Vietnam Alliance of Coaches (VAC)/APAC,
Susan Adams, President VAC/APAC Vietnam
Representative

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- AHK Saudi Arabia
- United Nations Development Programme Iran (UNDP Iran)

AUSTRALASIA/OCEANIA

1. Australia: International Coach Federation Australasia
(ICFA), Belinda Merry, President (in 2008) and First
Vice-President of the Asia Pacific Alliance of Coaches
(APAC), Australia
2. New Zealand: International Coach Federation Australasia
(ICFA), Patti Gwynne, President, New Zealand
3. Papua New Guinea: Diwai Pacific Limited (Commercial
Consulting Unit of the Divine Word University (DWU) in
Papua New Guinea), Sheryl Moriarty

EUROPE*

*(*updated and further extended list of countries and participants for the Global Survey from the European pilot)*

1. Austria: ICF Chapter Austria, Dr. Klara Kotai-Szarka
2. Belgium: European Coaching Association Belgium
(EMCC-ECA Belgium), Nathalie Alsteen, President
3. Bulgaria: MLC International Consulting Group,
Magdalena Nikolova; ICF Chapter Bulgaria,
Peter Goryalov, President
4. Croatia: Adrijana Strnad, Corporate Coaching
5. Cyprus: Dr. Sotiris Jeropoulos, Associate Professor,
Frederick University
6. Czech Republic: Czech Association of Coaches (CAKO)
(Rosta Benak, Leon-Libor Lacina, Jan Hruska, Lenka
Seibertova, Vladimir J. Dvorak, Milan Klindera,
Petr Kallista)
7. Denmark: The Coaching Company, Jesper Elling, President
8. Estonia: Marco Rillo, Chair of Organization and
Management, Tallinn University of Technology
9. Finland: ICF Chapter Finland, Kaj Hellbom, Director
10. France: Société Française de Coaching (SFC),
Pascale Reinhardt, President
11. Germany: Deutscher Bundesverband Coaching (DBVC,
German Coaching Association)
12. Greece: Theresia Remoundos, Business Coach
13. Hungary: KEY Consulting, Terezia Koczka, Managing
Director
14. Iceland: Leiotogi ehf/ICF Chapter Iceland, Bergsteinn
Isleifsson, CEO/Chapter Host
15. Ireland: Association for Coaching (AC) in Ireland,
Krishna De, Vice Chair
16. Italy: Federazione Italiana Coach (& ICF Italy),
Silvia Tassarotti, President
17. Latvia: Organisation Development Centre "Spring Valley",
Ilze Skuja
18. Lithuania: JSC "Baltic Coaching Centre", Oleg Kovrikov,
President
19. Luxembourg: Association Européenne de Coaching du
Luxembourg (AECL), Marie-Brigitte Bissen, President
20. Macedonia F. Y. R.: Clear View – BTC,
Jelena Stamenkova
21. Malta: WorkAssist, Patrick J. Psaila, Director
22. Netherlands: ICF Chapter Netherlands, Edmée Schalkx,
President
23. Norway: ICF Nordic Norway, Anne Kari Vindenes,
President
24. Poland: ICF Chapter Poland, Francois Nail, President
25. Portugal: Asociacion Iberoamericana de Coaching
(AIAC), Joao A. Catalao, President
26. Romania: ICF Chapter Romania, Serban Chinole,
Chapter Leader
27. Russia: International Coaching Academy/ICF Chapter
Russia, Svetlana Chumakova, Chapt. President
28. Serbia: EMCC Serbia, Sladjana Milosevic, President
29. Slovakia: Slovak Association of Coaches (SAKO),
Zlatica M. Stubbs, Chairman SAKO, and Klara Giertlová
30. Slovenia: Institute for Coaching, Franci Cec, Director

31. Spain: ICF Chapter Spain, Viviane Launer, President
32. Sweden: ICF Nordic Sweden, Mats Ogren, Board Director
33. Switzerland: Swiss Coaching Association (SCA), Peter Nilitschka
34. Turkey: ICF Chapter Turkey, Dilek Yildirim Akgun, President
35. Ukraine: Successful Communities Institute, Larissa Shidlovskaya
36. United Kingdom: Association for Coaching (AC), Alex Szabo, Vice Chair

NORTH AMERICA

1. Canada: Québec International Coach Federation, Yvon Lachapelle, Chapter President
2. Costa Rica: Margaret Rose Grigsby, Executive Coach
3. Dominican Republic: INVENIO, Maril Nunez, Principal
4. Honduras: ESA Consultores, Florentia M. Rodriguez
5. Mexico: ICF Mexico Centro Chapter, Mario M. Arreola Santander, President
6. Nicaragua: Management Coaching & Consulting Group (mc2Group), Raul Fajardo
7. Panama: Angela María Gutierrez Coaching y Consultoria, Angela Gutierrez
8. Puerto Rico: Instituto Internacional de Coaching de Puerto Rico, Carmen T. Cordova, President
9. Trinidad & Tobago: C2nd Coaching Leadership Action, David Brizan, Leadership Coach
10. USA: International Coach Federation (ICF), Kay Cannon, (Immediate Past) President

SOUTH AMERICA

1. Argentina: Asociacion Argentina de Profesionales de Coaching (AAPC), Rodolfo Laduz, President
2. Bolivia: Kieffer & Asociados, Michelle Kieffer Rodriguez, Gerente
3. Brazil: ABRACEM – Associação Brasileira de Coaching Executivo e Empresarial (Brazilian Association of Executive and Business Coaching), Rosa Krausz, President
4. Chile: Asociación Chilena de Coaching (ACC, Chilean Coaching Association)/INPACT S.A., Rosa del Corral
5. Colombia: ICF Chapter Colombia, Juan Pablo Giraldo, President
6. Ecuador, Maria Fernanda Corral, Executive Coach and OD Consultant
7. Paraguay: Javier Barbero Entrenamientos Creativos, Carlos Javier Barbero, Director
8. Peru: Asociación Peruana de Coaching (APCO, Peruvian Coaching Association), Claudia Draghi, Event Committee Director
9. Uruguay: Comunidad de Coaching del Uruguay, Gerardo Silbert, Promoter
10. Venezuela: Consultores IMMA CA, José Rafael Marín Castro, General Manager

IV. CLOSING NOTE

The Global Coaching Survey will be conducted regularly from now on, and it will be very interesting to see how coaching evolves on each continent in the future.

It is worth repeating that in many cases responses by participants are rough estimates. Coaching is a young discipline, and exact figures are rarely available (e.g. as most countries have no requirement to register as a coach, it is difficult to identify their number of coaches). So whilst the survey can provide a good first idea of coaching around the world, in each continent, region and country, it is far from being absolutely accurate. Where the results open up controversial discussions, this is welcome and in the spirit of the survey.

Also recall that, in this first run of the survey, there is a clear focus on professional one-to-one business coaching. This was deliberately chosen as it is the most visible and well-known coaching form so far in the corporate world and thus was a valid starting point. However, it is only the starting point. Next time, there will be much more coverage of other coaching forms (e.g. coaching leadership style, team coaching).

There is still a lot of research on coaching in the world to be done, and this survey may hopefully also serve as an

invitation and starting point for others to undertake further research in the field.

Share your knowledge/opinion – your contribution is welcome

If you want to comment and share your thoughts on the survey, give constructive feedback and/or tell us how you make use of the results, please send an email to:

info@bresser-consulting.com

If you would like to contribute to the next survey, please let us know and we can consider you as a future survey participant.

If you want to share your expertise/thoughts on coaching in your continent, region or country, please send an email to:

info@bresser-consulting.com

If you are or know someone who is a true expert in coaching for a specific region or country, please also let us know, and we will consider including you / the person in our high-quality expert network.

V. REPORT EDITIONS

There are different editions of this report available that can all be downloaded from the following website for free:

www.frank-bresser-consulting.com/globalcoachingsurvey.html

- Complete edition: The whole report
- Executive Summary only
- Special edition Africa (African Coaching Survey 2008/2009)
- Special edition Asia (Asian Coaching Survey 2008/2009)
- Special edition Australasia (Australasian Coaching Survey 2008/2009)
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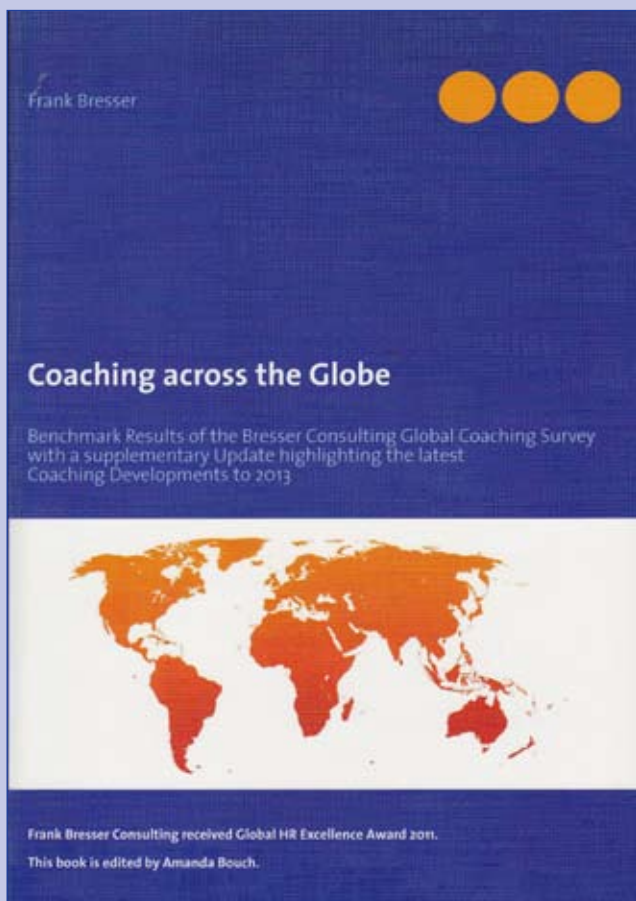
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VI. ABOUT FRANK BRESSER CONSULTING

The research project was initiated and conducted by Frank Bresser Consulting.

Frank Bresser is the global business expert for the successful implementation and improvement of coaching. Supported by his worldwide team of assistant consultants, he advises companies on the effective use of coaching. His expertise is used and put in practice successfully in organisations across the globe and has set international standards in the implementation and improvement of coaching.

More information at: www.frank-bresser-consulting.com

Frank Bresser, M.B.A.

Mobile +49 (0)1 79 - 4 33 88 76

Email: frankbresser@bresser-consulting.com

Frank Bresser Consulting Office:

Tel. +49 (0)2 21 - 5 70 86 42

Email: info@bresser-consulting.com

Fax +49 (0)2 21 - 5 70 86 43

Postal address:

Fridolinstr. 13, 50823 Cologne, Germany

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