

# **Briefing on the Trade and Investment Insurance Training Program (TIITP)**

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1. The Trade and Investment Insurance Training Program (hereafter TIITP) is the largest project in the APEC history, which includes TIITP '97 and TIITP '98. The Ministry of Personnel of People's Republic of China is the Project Overseer of TIITP and its co-sponsors are Australia; Brunei Darussalam; Canada; Hong Kong; China; Indonesia; Japan; Korea; the Philippines; Singapore and Thailand. The TIITP '97 project was proposed by the Project Overseer at the 14<sup>th</sup> APEC Human Resources Development Working Group (HRD WG) Meeting in Brunei Darussalam in June 1996 and subsequently endorsed by that WG Meeting and approved at the 8<sup>th</sup> APEC Ministerial Meeting held in Manila in November 1996 for inclusion in the 1997 budget with a provision of US \$500,000 from the TILF Account. While being a follow-up project to the TIITP '97, the TIITP '98 project was proposed by the Project Overseer at the 16<sup>th</sup> meeting of the APEC HRDWG in Montreal in May 1997 and subsequently endorsed by that WG Meeting and approved by APEC Ministers in Vancouver in November 1997 as a cooperative project between the HRDWG and the Working Group on Trade Promotion (WGTP) with a 1998 budget provision of US \$500,000 from the TILF Account.

## **Part One: Project Implementation**

2. The purpose of the TIITP is to promote trade and investment liberalization and facilitation in the APEC region by training those who are working or will work with organization which provide trade and investment insurance in the region. To implement the TIITP project, two kick-off meetings were held, one in Beijing in March 1997 with the attendance of 22 experts from 5 member economies and the other in Guilin of China in August 1998 with the attendance of 23 experts from 7 member economies and the APEC Secretariat. With the joint efforts of the cosponsors, organizers, experts/lecturers, trainees, APEC Secretariat and other partners, nine training programs on different themes under the TIITP were successfully implemented in Manila (twice), Jakarta (once), Beijing (twice), Bangkok (twice), Xiamen (once) and Shanghai (once) in 1997 to 1999 with the participation of 238 trainees from 13 APEC member economies. The organizers of individual programs are the People's Insurance (Property) Company of China (two programs), Philippine Export and Foreign Loan Guarantee (two programs), the Export and Import Bank of Thailand (two programs), the Export and Import Bank of China (two programs) and Indonesia PT. Asuransi Ekspor (one program). And a wrap-up meeting was held in Nanjing and Suzhou of China in December 1999 with attendance of 31 delegates from 10 member economies.

## **Part Two: Project Evaluation and Conclusions**

3. A comprehensive evaluation was undertaken in each training program. The reports on all programs indicate that the evaluation survey was conducted mainly through questionnaires though written co-ordinator responses and verbal feedback were also obtained. In general, the evaluations of each training program as well as the TIITP project as a whole was quite positive. The followings are the main conclusions:

- This project is highly innovative and pioneering venture which had not been attempted previously in APEC. It achieved cross-regional participation (utilising the great diversity in APEC), and participation included both senior executives and upwardly mobile management working in a challenging, significant, and rapid growing field of the trade and investment insurance sectors. Significantly it was the first multinational cooperative project specifically aimed at liberalizing trade and investment undertaken by APEC HRDWG and WGTP, and the first project of the HRDWG under the APEC TILF Special Account.
- This project marks a milestone for the HRDWG. It demonstrates the fact that HRD is also vital in the liberalization and facilitation of trade and investment. This project has built in the agenda of the TILF (trade and investment liberalization and facilitation) and ECOTECH (economic and technical cooperation). Also, the project proves the fact that ECOTECH and TILF can work together in pursuing the goals of APEC Osaka Action Agenda.
- The establishment and successful implementation of TIITP is an important deliverable in APEC's economic and technological cooperation, as well as a significant contribution to APEC's human resources development. It has immense current significance to the promotion of economic and trade development in the Asia and Pacific region. By facilitating the effective use of the capital, advancing inter-regional co-operation in human resources development, and especially by improving the professional ability and management skills of those currently, or those in the future, working in international trade, it is major catalysts to the achievement of the Bogor objectives.
- All the programs were designed for, and met, the specific identified needs of the participating APEC member economies. The individual programs were well structured in terms of their content necessarily was repeated in other programs though each had its unique characteristics.
- The host organizations that were tasked with organizing the respective programs did an excellent job of identifying and addressing the training needs of the participants. The fact that the host economies/agencies were located in the region and were familiar with its needs, appeared to be a contributing factor in the overall positive response to the programs.

- The Experts Group was key to ensuring that the TIITP project offers consistently high value for participants. It provided a knowledgeable, independent, multicultural perspective on quality that was necessary on both an individual program basis and an overall project basis. Quality and value was the determinants of the long term sustainability of TIITP. In addition, the Experts Group provided a non partisan mechanism for individual program and overall project evaluation.

### **Part Three: Recommendations on the APEC Training Project**

4. The achievements of the TIITP are a notable success. Nevertheless, to ensure a more effective outcome and to achieve the objectives of an APEC project like the TIITP, there were a number of lessons learned from the TIITP which may be incorporated into the implementation of future APEC training projects. Since the TIITP is unique in the APEC history and all training programs have been successfully conducted, the plan for and the implementation of an APEC project may build on the experience of the TIITP which illustrates the APEC training model to some extent. In general, the following specific issues must be addressed in designing and implementing the APEC training programs in the future.

#### **Implementation Plan**

5. A detailed implementation plan must be developed for a training project. At the strategic level the implementation plan should take into account recent events in the region that have underscored the need for effective risk management in trade and investment insurance activities. At the operational level the implementation plan will build on the experience of the TIITP and the recommendations contained in the evaluation of that program. In details, the implementation Plan of an APEC training program must include the following elements: objective, theme, training target, planned outcomes, program organizer, timing and venue, trainees (including number, sources, level and ability), instructors (number, source, qualifications), content of the curriculum, working language, methods of instruction, program budget and financial administration, responsibility for logistics. All of these items must be clearly described and provided to some senior consultants for consultation and input. The project co-sponsors in consultation with the consultants must give approval for the plan. This must be done well in advance of the delivery of the program.

#### **Duration of the Training Course**

6. The duration of a training course should be compatible with the availability of resources, and perceptions of the time available for managerial level personnel to leave their own work for training purposes. According to the experience with the programs, variations in the duration of individual programs might be considered in the future depending on the specific focus and the level of attendees. If the senior staff or the top executives are the target participants, the duration of the seminar may not be two or three weeks as they cannot be away from office for too long. It appears that one-week or less is an appropriate period for such group.

## **Areas for Future Training**

7. It would be useful to identify a core knowledge area that the future project would cover, as well as areas of specialization that would minimize overlap. This would allow participants to choose the program that most closely met their needs. Since some topic areas would be repeated at the various training programs, it would be important to use different lecturers to provide a unique approach to the issues. Topics for training program can be developed based on the service offering categories in conjunction with the levels of participants within the organization. The training needs include both management and technical skills training to increase the competencies of senior managers in promoting trade and investment liberalization in the APEC region. For different types of participants, the focus of training can be different in terms of knowledge focus, skill development focus, and attitudinal or behavioral change focus. Usually, a training program has a combination of some of the above components. However, it is rarely articulated in the program design so that the lecturers and participants may have different expectations. Even if it appears to be obvious, it is important to articulate those focus and check the design and delivery mode accordingly in advance.

## **Lecturers**

8. The effectiveness of the lecturer is an important factor for trainees in their comprehension of the issues and contributes strongly to their opinion of the relevance of the session. The more effective the lecturer, the greater the likelihood that participants will understand the topic area and benefit from the training. A set of clear but different criteria should be developed for selecting lecturers, including experience in subject matter, experience in cross cultural training and fluency in English. As usual, lecturers will be recruited locally or from other APEC economies depending on the specific needs of the program. But in the future there should be some flexibility on inviting lecturers from non-APEC members. Specifically, lecturers be selected on a global basis, based on a clear learning objective and the intention to recruit the best available expertise.

## **Teaching Materials**

9. Teaching materials should be well prepared by lecturers, reviewed by the project consultants, and delivered to the trainees with enough time prior to the training course. Where possible, more hand-on participative approach should be used. Other than case study reading, there may be alternative ways to engage the participants.

## **Teaching Methods**

10. The basic pedagogic approach to this program has been classroom lecturing supplemented by discussion, case studies and field study. There is a need to more fully develop discussion workshops and case studies to actively involve all participants with reduced lecture time and more time spent in group discussions, field studies and other

forms of participatory learning, and to ensure that practical examples and applications as well as exchange of experiences are integral parts of the curriculum design.

### **Target Participants**

11. The stringent criteria should be developed for screening and selecting participants. The criteria should include the levels of participants in their organization, and their experience and language proficiency. The criteria should also cover the obligations of the trainees in term of their long term interest in working ECAs, their career development, and the passing-on of what they have learned from their colleagues. It will be important for the Program Organizers to adhere to predetermined and agreed selection criteria. It will also be important to ensure that participants have realistic expectations about the foundation for further professional development provided by the Programs, and that there be a measure of homogeneity in terms of background, experience and needs of the participants in the Programs. As the programs will be participatory in nature, with considerable value from the exchange of viewpoints and experiences, trainees will be expected to contribute to the discussions as well as to learn. Care must also be made to ensure that there is a good representation from APEC economies.

### **Program Director of Facilitator**

12. In some cases, the participants will not be able to familiarize themselves to the styles of the lecturers and miss out the opportunity to maximize their learning. For this reason, and for the consistency and integrity of the program, it is desirable to have a facilitator throughout the program, who will sit throughout the course to provide integration and coherence to the program and to provide lecturers of inputs about the participants and topics covered by the prior lecturers. The facilitator can also play a key role in making sure that the relevance of the topic is understood and shared by the trainees and the lecturer, and set the right tone for the program in line with the learning objectives: knowledge, skills and behavior. This type of learning facilitator is an important aspect of the training, whose talent should be developed in-house.

### **Field Studies**

13. It is appropriate to arrange two days of field studies for a training program with ten days. In the case of the TIITP'98, all the field studies prove to be successful, as they also act as case studies which are the exciting form of teaching that promotes the active participation and communication among trainees and lecturers. However, for the sake of further enhancing the effectiveness of the field study, it is quite necessary to design the field study well and make full preparations before it starts. Clear instruction on the purpose of the field study should be given to the trainees in terms of what knowledge and techniques they will need to apply to the field study. Lecturers should be invited to monitor the field study and offer necessary guidance. Just in following up to the field study, lecturers should provide the trainees with an analysis on the field study and encourage them to discuss by groups what they have obtained form the field study. The

host of the field study should be briefed on the composition of the visiting group and advised of their particular interests in the host enterprises.

### **Preparations and Coordination**

14. Lead time is required in order to ensure the suitably qualified instructors are engaged and fully briefed in advance of the program, that all teaching materials are prepared in advance and that appropriate advance materials are circulated to participants in a timely manner. As to the project coordination, it is vital to have clearly defined objectives of the training program that are communicated and understood by all those involved. One step to facilitate achieving this is to move a more centralized project management model which will provide stronger support to the Program Organizers. It is also important to establish a network to ensure effective communications and cooperation among the project lead institute, individual program organizers and participants.

### **Training Support**

15. Although less recognized, Training Support affects the effectiveness of learning. The examples are the physical shape of the training room, break-up rooms for small group discussion, seating arrangement (whether class room type or round table style). These depend again on the trust of the training. For a program, which stresses participation, a round table or U-shape seating is more appropriate than a class room type.

### **Evaluation**

15. The principle methods of assessing outcomes will be an evaluation questionnaire of common design using five-point scale rating system. This will facilitate analysis and comparisons. Feedback will also be sought from the instructors. In case the training project is a serial one, a consistent evaluation framework must be developed and implemented to measure the outcomes of the training programs. The different formats of the questions in the evaluation forms complicated the evaluation of the sessions and weakened the conclusions that could be drawn.

### **Outcomes**

15. It will be important to clearly define the expected outcome of the training project. The Project Overseer will be responsible for producing and maintaining a complete set of the documentation including project proposal, management plan, curriculum, program evaluation, observations and learnings by the organizers and teaching materials, and reporting the outcome to the co-sponsors, network members, working group, APEC Secretariat and other related APEC fora.

### **Extra-curricular Activities**

16. Activities conducted in a social setting, out-side of classroom, would bring the participants (and lecturers) much closer together than the formal setting. If such activity is organized at an early stage of the training program, team spirit may emerge, thus enhancing the understanding among the participants and the lecturers, and helping the program to be more effective.

### **Networking**

17. The participants should take advantage of the networking that exists through such a gathering like the TIITP courses, take the opportunity to get to know one another and keep in touch even after the training program. This is what APEC is all about. Networking in the endeavor to deepen the spirit of the community among the APEC participants. There should be consideration of how to establish an ongoing learning network of alumni.