

出國報告（出國類別：出席國際會議）

CII International Affiliated
Institute Forum Meeting
英國皇家保險學院國際論壇

服務機關：財團法人保險事業發展中心

報告人：王其盈 專員

陳喬琳 專員

會議日期：111 年 6 月 16 日

報告日期：111 年 7 月 25 日

摘要

英國皇家保險學院(The Chartered Insurance Institute; CII) 於本(111)年 6 月 16 日以視訊連線方式辦理 International Affiliated Institute Forum meeting，本中心由教育訓練處王其盈專員及國際事務處陳專員喬琳出席。

本次會議邀請超過 30 間保險相關機構出席會議，並橫跨歐美、亞洲及非洲等地區，會議依照區域性分成兩個場次；中南亞及亞太地區及歐美非地區，議程包含專題講座及討論，本中心參與場次為中南亞及亞太地區場次，此場次共有四個主題：CII 之「共同創造未來」徵詢結果(CII Consultation)，市場發展趨勢—機會與挑戰之回顧(Developing Trends)，協助學習者進步之作為 (Initiative)及 共同合作以推廣 CII 之相關服務(Joint Marketing)。

本中心也積極與各國保險機構交流，針對保險知識持續推展，也呼應本中心扮演區域性保險智庫的角色。

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壹、 會議目的及過程

英國皇家保險學院(CII)為一個金融保險服務專業機構，致力於保險和財務規劃行業建立公眾信任。本年度會議因受疫情影響持續以線上視訊方式舉辦，與會人員來自 CII 亞洲聯盟組織夥伴，包含中亞、南亞及亞太地區。

主辦方 CII 於會中談及今年發展主軸，並說明 CII 隨著近年全球疫情調整課程內容，提供與時俱進之課程主題，協助會員迅速掌握全球脈動，並期待與各聯盟組織夥伴合作，規劃實體以及線上遠距課程。

貳、 重要會議議程及內容重點

一、 CII 宗旨

CII 課程能滿足每一位 CII 會員於學術或工作領域之需求，透過課程專業認證得與其職涯發展相互連結。

二、CII 課程規劃目標

A.簡化資格認證

CII 認證機制深獲不同域與年齡層參與者支持，依據統計資料，平均每 10 位英國參與者中有 7 人認同；平均每 10 位國際參與者中有 9 人支持。CII 提供靈活多樣之課程，課程內容兼顧理論與實務，參與者能就工作相關領域選擇相關學習課程。

B.CII 課程優勢

CII 提供靈活多樣之課程，其資格認證課程設計由簡入深，並依據各國保險市場實務經驗調整課程內容以接軌全球保險發展趨勢，同時滿足不同會員需求。

C.會員資格

CII 考量每一位會員工作經驗不同，提供客觀的認證機制，協助會員折抵部分學分，以期會員迅速尋求適當課程並取得國際認可證書資格。

三、CII 與國際保險機構之合作策略

(一) 長期提供保險專業課程

(二) 協助聯盟組織夥伴推動國際保險課程

CII 雖人員編制有限，但藉由與全球各地保險訓練中心合作，得以提供在地化保險服務，長期推廣實體或遠距線上課程；CII 另可針對不同企業需求提供線上遠距或實體培訓課程。

(三) CII 課程採學分制度，能補足不同國家現行學程制度與國際認證課程間之差異，提供更具專業且實用之課程規劃。

四、本中心分享保險資訊及保險教育訓練課程

(一) 本中心除了提供實體課程外，也建立完善的遠距線上課程，講師及與會學員也比疫情前更加適應以遠距線上課程方式，整體遠距線上課程品質也有顯著提升。

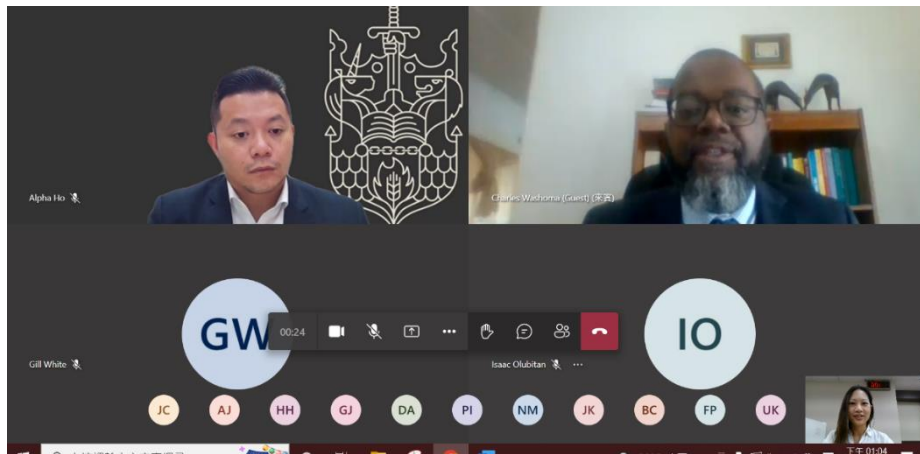
(二) 近年來，台灣保險業市場趨勢包含科技技術應用、ESG 等面向，而主管機關也十分關注高齡金融消費者保護等議題，另外，因本中心也扮演區域性保險智庫的角色，國際保險議題也是本中心關注焦點，如接軌 IFRS 17，故本中心也以研討會形式辦理專題講座，講師群除國內講師外，經常性邀請國外專家學者分享交流。

(三) 本中心也開辦保險業務員必修課程，為落實保險業務員在職進修，以提升業務員素質並強化業務員對相關法令遵循，本中心負責數位課程之錄製，建立學習平台。

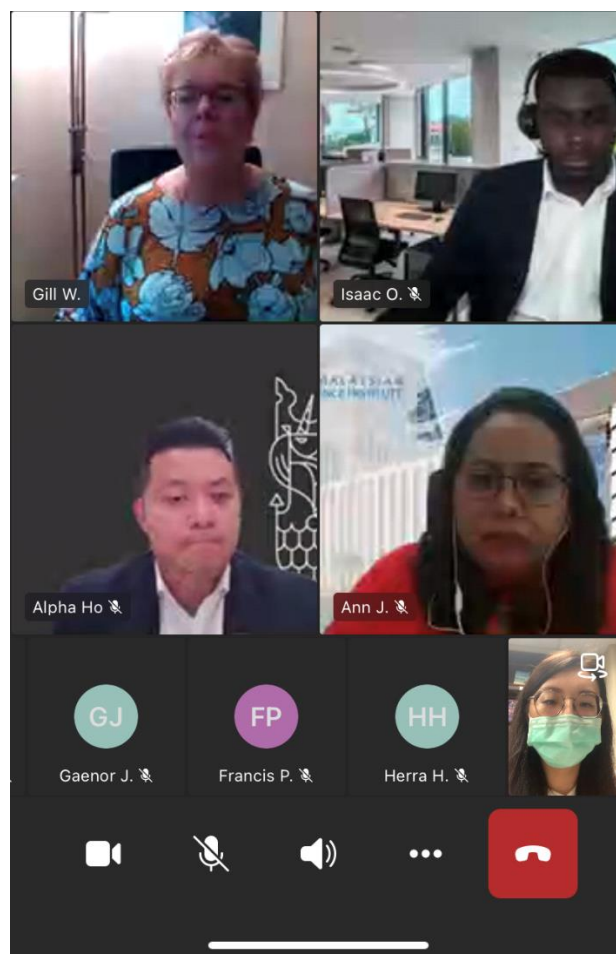
肆、心得與照片

藉由本次國際視訊會議，除更了解主辦單位 CII 與其他與會機構教育訓練課程主軸與模式外，中心兩位參會同仁也於會中表達台灣保險業目前著重於金融科技、資安議題、ESG、高齡弱勢金融保護與業務員 6H 教育訓練等議題，期待未來有機會與國際保險發展機構相互合作，共同辦理國際研討會或其他教育訓練課程，互利互惠，俾利台灣保險從業人員獲取更完善的保險知識。

除此之外，本次會議時長僅只有一小時，但於會議中安排開放性討論，達到充分意見交流及資訊互換，建議未來本中心辦理會議能夠增加討論時間，及在參加國際研討會中，多加利用機會分享保險資訊，強化國際能見度。



圖一 王其盈專員分享教育訓練課程畫面截圖



圖二 陳喬琳專員參與 Open Discussion 畫面截圖



INTERNATIONAL AFFILIATED INSTITUTE FORUM					
MEETING #1					
Date	16 th June 2022 (two sessions)	Venue	Virtual (MS Teams)	Participants	See appendix
Please note the Forum will comprise two sessions. The first session (0600 BST) will involve institutes in Central and South Asia, and Asia Pacific . The second session (1300 BST) will involve institutes in Africa, Europe and the Americas .					
AGENDA					
Item	Item	Detail		Comment	
1	Introduction 5 Mins	<ul style="list-style-type: none"> Welcome Update since last meeting Today's objectives 		Charles Washoma	
2	Topic #1: CII Consultation 20 Mins	<ul style="list-style-type: none"> Outcome of CII's "Shaping the Future Together" consultation 		Gill White	
3	Topic #2: Developing trends 25 Mins	<ul style="list-style-type: none"> Developing Market Trends – Review of Opportunities and Challenges 		Charles Washoma Open discussion	
4	Topic #3: Initiatives 5 Mins	<ul style="list-style-type: none"> Initiative to support learner progression 		Alpha Ho	
5	Topic #4: Joint Marketing 30 Mins	<ul style="list-style-type: none"> Working together to jointly promote our offerings 		Charles Washoma Open discussion	
6	Final remarks and close 5 Mins	<ul style="list-style-type: none"> Any other business 		N/A	

APPENDIX: PARTICIPANTS

CII

Chair	Charles Washoma	Vice President, Affiliated Institutes
CII Management	Pauline Azzopardi	CII Board member - International
	Alpha Ho	Corporate Development Manager, Asia Pacific
	Gaenor Jones	Regional Director, Middle East
	Ben Cranwell	Business Development and Project Manager, MEA
	Isaac Olubitan	International Manager
	Kenny Sui	Regional Director, Asia Pacific
	Gill White	Chief Customer Officer

Institutes Invited

Session	Region	Institute	Local Time
Session #1 6:00am UK Time	Central & South Asia	Insurance Institute of India	10:30am
		Institute of Insurance and Risk Management, India	10:30am
		Pakistan Insurance Institute	10:00am
		Sri Lanka Insurance Institute	10:30am
	Asia Pacific	Indonesia Insurance Institute	12:00pm
		Malaysian Insurance Institute	1:00pm
		Insurance Institute for Asia and the Pacific, Philippines	1:00pm
		Singapore Insurance Institute	1:00pm
		Taiwan Insurance Institute	1:00pm
Session #2 1:00pm UK Time	Africa	Insurance Institute of Botswana	2:00pm
		Insurance Institute of Egypt	2:00pm
		Chartered Insurance Institute of Ghana	12:00pm
		Insurance Institute of Kenya	3:00pm
		Insurance Institute of Malawi	2:00pm
		Insurance Institute of Mauritius	4:00pm
		Insurance Institute of Namibia	2:00pm
		Chartered Insurance Institute of Nigeria	1:00pm
		Insurance Institute of South Africa	2:00pm
		Insurance Institute of Tanzania	3:00pm
		Insurance Training College, Uganda	3:00pm
		Insurance Institute of West Africa	12:00pm
		Insurance Institute of Zambia	2:00pm
		Insurance Institute of Zimbabwe	2:00pm
	Europe & Americas	Insurance Institute of Cyprus	3:00pm
		Gibraltar Insurance Institute	2:00pm
		Insurance Institute of Ireland	1:00pm
		Insurance Institute of Malta	2:00pm
		Insurance Institute of Barbados	8:00am
		Insurance Institute of Canada	8:00am
		College of Insurance and Professional Studies	07:00am
		Trinidad and Tobago Insurance Institute	8:00am

CII Asia Pacific List of Courses for 2022

Negotiations (2-hours each)

- 1) Negotiating with the London Market. A skills and communications masterclass for the Malaysian market.
- 2) Creating and claiming value in negotiations.
- 3) 7 habits of highly effective negotiators in the insurance industry.
- 4) Building trust through communication in online negotiations.

Claims (2-hours each)

- 1) Causation and proximate cause made simple.
- 2) Using the internet and social media for claims.
- 3) 7 habits of highly effective claims handlers in the insurance industry.

Cognitive Skills (2-hours each)

- 1) The art of disagreement: turning obstacles into opportunities.
- 2) Critical thinking and decision-making skills for insurance professionals.
- 3) Problem solving through creative thinking for insurance professionals.
- 4) The art of unknowing: how to learn to unlearn and make better strategic decisions for you and your clients.
- 5) Cognitive flexibility: an essential skill for the 4th industrial revolution.
- 6) Cognitive biases in the insurance industry: how to recognise and overcome them.

Communication Skills (2-hours each)

- 1) Communicating with customers in difficult and uncertain times.
- 2) How to understand and explain insurance policies in 5 easy steps.
- 3) Humanising communication and increasing client interaction in an automated world.
- 4) From criticism to collaboration: communication strategies for dealing with complaints.
- 5) The art of listening to what people DON'T say.
- 6) Hard talk: how to communicate with customers about price rises and other impacts of a hard market

Insurance Fraud (2-hours each)

- 1) The psychology of insurance fraud.
- 2) Insurance fraud: current trends in the ASEAN region and the global markets.
- 3) Application fraud: the forgotten frontline battle.
- 4) Ghost broking: the not so phantom menace.

Business Development (2-hours each)

- 1) SURE: a new technique for ensuring customers have listened to and understood your advice.
- 2) Trust, transparency and visibility: striking the right balance in the new normal.
- 3) Trust and loyalty: how to win it and how to keep it.
- 4) Drafting policies to match brand promises, marketing messages and client expectations.
- 5) Meetings: making more of less.

Study Skills (2-hours each)

- 1) How to read, understand and apply laws and regulations.
- 2) 7 habits of highly effective learners: how to be more productive and effective when studying for professional qualifications.

Marine Insurance (Hour varies for each course)

- 1) Marine Risks in Perspective – Dynamics, Pitfalls and Challenges (3 Hours)
- 2) Roles of Marine Cargo, Hull Surveyors, GA Adjusters, Experts and Makers' Specialists (6 Hours)
- 3) The Nature & Handling of Marine Cargo and Hull Claims (6 Hours)
- 4) The Marine Operating Environment in South East Asian Countries (3 Hours)
- 5) Loss Prevention (Cargo, Hull, Freight Forwarders, Shipyards, Terminals, etc.) The
- 6) Responsibility of Management / Assureds (4 Hours)
- 7) The Role of Surveyor in the Cargo Claim Process (4 Hours)
- 8) The Role of Surveyor in the Marine Hull Claims Process (4 Hours)
- 9) Procedural Flexibility and Sensitiveness in Trade and Contractual Dispute Mediation (2 Hours)
- 10) Deviation & Reasonable Despatch (2 Hours)
- 11) Practical Review of Towage Considerations (2.5 Hours)
- 12) Perspective on Loss Control Measures for Ships and Cargo Shipments (3 Hours)
- 13) The Dynamics of Maritime Casualty Investigations (6 Hours)
- 14) How Different Ship Types and Construction Characteristics Affect Marine Hull Risks (4 Hours)
- 15) Mediation/Arbitration as an Alternative Dispute Resolution for Insurance Claims Dispute as against Litigation (2 Hours)
- 16) A Case History of Transnational Mediation between a Chinese and Norwegian Insurers involving Cross Liabilities of Two Ships involved in a Collision at South China Sea (1.5 Hours)
- 17) Practical Aspects of Marine Hull Insurance
- 18) Marine Cargo Underwriting Considerations in the Light of Modern Day Challenges such as Sanctions, Environmental Hazards and Strict Regulatory Operation Environment (3 Hours)
- 19) Marine Cargo Insurance – The Challenges Beyond (3 Hours)
- 20) Hull Insurance – The Hidden Agenda due to Complexities of Repair Procedures and Machinery Claims (4 Hours)
- 21) Specific Problems Faced by Multi-Transport Operations (3 Hours)



- 22) The Advantages & Disadvantages of Arbitration Process in the Resolution of Insurance Related Claims (2 Hours)
- 23) Can Salvage Costs of Ships and Cargo be Controlled? (3 Hours)
- 24) Management of Just In Time Risks Exposure in Modern Logistics Business (3 Hours)
- 25) The Impact of China's Unprecedented Infrastructure & Economic Developments on
- 26) Underwriting and Claims Considerations (1.5 Hours)
- 27) Maritime Infrastructural and Risks Hazards in East Asia (3 Hours)
- 28) Arbitration Process in Commercial Disputes (2 Hours)
- 29) Shortcomings in Oil & Chemical Compensation Regime (2 Hours)
- 30) Preservation of Evidence for the Shipment of Grains Cargo
- 31) Shipbuilders Risk Assessment (3 Hours)
- 32) Why is English Law Commonly Used in International Trade (3 Hours)
- 33) Understanding Marine Vessels & Shipping Operations (2 Days)
- 34) Risk Assessment of Port Terminals, Freight Forwarders and Inland Freight Stations (4 Hours)
- 35) How to Handle Large Hull and Cargo Claims Proactively (2 Days)
- 36) How to Conduct and Evaluate Risks in Inland Transits of Heavy Plant and Equipment in Less Developed Countries (3 Hours)
- 37) The Issues and Liabilities Arising From a Collision Between Ships (3 Hours)
- 38) Package and Weight Limitation under Hague Visby Rules, Hamburg Rules, Rotterdam Rules, 1957 Limitation Convention and The 1976 Limitation Convention (3 Hours)
- 39) Principal Considerations of Food Grains Shipment
- 40) Project Cargo Risk Management and Claims (include business environment, the legal
- 41) environment of project cargo transported by road, rail, sea and air, and scope of cover and market practices of project cargo insurance, underwriting risks control, claims procedures and considerations and warranty surveys). This topic is set to play an important role in the Belt and Road Initiative in the coming years) (6 Hours)
- 42) Realty Checks on Scope and Coverage and Exclusions in Marine Cargo Policies (3 Hours)
- 43) The Need to Review Case Prospects before Arbitration and Mediation (1.5 Hours)
- 44) The Implications of Navigation Clause in Institute Time and Voy Clauses (1.5 Hours)
In-Depth Study of the Nature, Risks and Legal Liabilities of Freight Forwarders Business (4 Hours)
- 45) The Impact and Implications on Cargo Insurers and Cargo Interests Arising From the Popularity of using Seaway Bill or Waybills for Ocean Carriage in Multi-Modal Operations (2 Hours)
- 46) Effective Handling of Catastrophe Accidents such as Collision, Grounding, Sinking, Chemical and Oil Pollution and Fire, Collapse of Container Crane, etc. (4 Hours)
- 47) Claims and Recovery – Best Practices on High Tech/High Value Electronics and Machinery such as Windfarm Equipment (4 Hours)
- 48) Marine Insurance in Perspective – Detailed Analysis of the Entire Marine Insurance Act 1906 (2.5 Days)

主旨 **RE: INVITATION: International Affiliated Institute Forum - 16th June - Session 1**

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寄件日期 2022.06.20 11:16

附件



- image002.png (52 KB)
- image003.png (16 KB)
- CII Asia Pacific List of Courses for 2022.pdf (265 KB)

Dear Ms Huang

I'd like to just send a short email to thank TII for nominating Jolin and Gracy to attend our recent International Affiliated Institute Forum last week.

We received valuable inputs from both Jolin and Gracy and sharing our TII's support of professional training and development for Taiwan insurance industry.

Where there was mentioned of various webinars being conducted by TII, I like to share that we at the CII have been supporting our Affiliated Institute's with UK and regional speakers and topics on a collaboration basis. We have conducts various which I have attached for your reference.

Please do let me know if TII would be interested in any of these topics to offer to your market?

Kind regards,
Alpha



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