Maritime and Aviation Training Fund
Professional Training on
Smart and Green Logistics Scheme
(PTSGLS)

Guide to Course Providers
for Pre-approved Courses

Effective from 4 October 2024

CONTENTS

1. GENERAL

1.1 Background

1.1.1 The Government of the Hong Kong Special Administrative Region (the Government) has attached great importance to the sustainable development of the logistics industry. Under the Action Plan on Modern Logistics Development promulgated in October 2023, it is the Government's target to accelerate the high-quality development of logistics industry and develop Hong Kong into a sustainable international smart logistics hub focusing on high-value goods and the e-commerce markets.

1.1.2 The logistics industry has been evolving rapidly over the past decades with the booming of e-commerce and the increasing importance of sustainable development. With a view to helping the logistics sector to nurture more professional talents and to encourage in-service practitioners to equip themselves with up-to-date knowledge to support the industry to upgrade and transform itself towards the direction of green and smart, the Government launched the Professional Training on Smart and Green Logistics Scheme (PTSGLS, the Scheme) on 8 January 2024 under the Maritime and Aviation Training Fund (MATF)[1]. The Scheme has been enhanced with effect from 4 October 2024 to, amongst others, include courses that operate on a self-financing basis with a view to providing more diversified course options to logistics industry practitioners.

1.1.3 The Scheme is overseen by a Steering Committee of the PTSGLS under the Subcommittee on Industry Development (hereafter referred to as the "Steering Committee") of the Hong Kong Logistics Development Council[2] (hereafter referred to as "LOGSCOUNCIL"). The Steering Committee will assess the applications for inclusion of new training courses on the List of Pre-approved Courses under the Scheme.

1.1.4 The Government has engaged Hong Kong Productivity Council (HKPC) as the implementation partner of the Scheme to provide Secretariat support ("the Secretariat"). This Guide to Course Providers for Pre-approved Courses (hereafter referred to as "the Guide to Course Providers") sets out the details and application procedures for pre-approved courses of the

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[1] The Government established the MATF in 2014 to support the manpower development of aviation and maritime industries, so as to enhance Hong Kong's competitiveness as an international maritime centre as well as an aviation and logistics hub. In supporting the sustainable development of logistics industry, as announced in the 2023-2024 Budget, the Government has injected $200 million to MATF the to provide more dedicated funding support to strengthen manpower development and promotional efforts of the logistics industry, in addition to enhancements to other training schemes and initiatives relating to aviation and maritime industries.

[2] Established in December 2001, the LOGSCOUNCIL is a forum for the Government and industry stakeholders to advise on initiatives to promote the development of the logistics industry in Hong Kong. The LOGSCOUNCIL is chaired by the Secretary for Transport and Logistics, with non-official members who are stakeholders from a wide spectrum with diverse expertise and knowledge from the supply chain sector.

Scheme.

1.2 Objective of the Scheme

1.2.1 The Scheme provides funding support[3] to logistics industry practitioners to attend **local** training courses organised by eligible organisations, trade associations, professional bodies and education/training institutes in or related to the logistics sector in Hong Kong with the aim to encourage industry training and development on –

– **Smart logistics** in terms of the adoption of logistics technology and smart solutions for the sustainable development of modern logistics industry, especially the provision of high-end and high value-added logistics services; and

– **Green logistics** in terms of enhancing the awareness and understanding of environmental protection and sustainable development as well as adoption of relevant practices for the logistics industry.

1.2.2 Course provider should also read the *"Guide to Applicants for Refund of Course Fee (with Application Form)"* for reference.

1.3 Scope and Requirements of the Training Courses

1.3.2 The Scheme covers training courses directly related to smart and green logistics and related technologies to be conducted in Hong Kong whose curriculum should include but may not be limited to:

(a) latest professional, technical knowledge and practical skills in advanced logistics practices, such as those in relation to e-logistics, special cargo handling, digitalisation, blockchain, artificial intelligence, big data analytics, robotics and automation technology, cybersecurity, environmental, social and governance (ESG), etc.; or

(b) other logistics-specific topics that can be identified in standards, manuals or guidelines established by professional bodies, trade associations or other relevant organisations in the logistics industry.

1.3.3 All training must be conducted in Hong Kong. Nevertheless, the Steering Committee may consider granting approval, on a case by case basis, to refund a certain part(s) of a training module(s) conducted outside Hong

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[3] Each eligible course participant will be refunded 80% of the course fees, subject to a maximum amount of HK$30,000, for the pre-approved courses. Each individual may apply for course fee refund for more than one pre-approved course, up to a cumulative cap of HK$30,000 per person under the Scheme.

Kong, if any.

1.3.4 The training courses could be conducted either online or through physical attendance in the form of, including but not limited to, short course, certification programme, seminar, webinar or online self-learning programme.

1.3.5 Course providers are required to apply for approval of the training courses (hereafter referred to as "pre-approved courses") for inclusion in the List of Pre-approved Courses under the Scheme before course commencement.

1.3.6 Pre-approved courses have a validity period of 3 years and will be subject to a periodic review once every three years. Details of the review mechanism are provided in paragraph 4.1.

1.3.7 Course providers are required to maintain proper documentation (including but not limited to complete and accurate records of attendance, assessment and payment of course fees) in accordance with paragraph 4.2 for the Secretariat's checking upon request and ensure that their pre-approved courses are conducted in alignment with the descriptions in the relevant applications as approved by the Steering Committee and in compliance with any approval conditions set by the Steering Committee. The Secretariat may selectively sit in the courses as an observer to ensure the aforesaid alignment and compliance.

1.3.8 Training courses which have received/would receive other sources of funding support provided by the Government will not be eligible for registration under the Scheme. Course providers have to declare in their applications that the proposed training courses have not received such other sources of funding support and are not applying for such funding support at the time of application under the Scheme.

1.3.9 A pre-approved course has to be carried out strictly in accordance with the applications as approved by the Steering Committee. Any variation, modification, amendment or addition to the pre-approved course, including but not limited to change of pre-approved course duration and curriculum, shall require prior written approval by the Secretariat and the Steering Committee. Reasons with supporting documents for the changes must be provided. Otherwise, the processing time of refund applications from course participants may be affected.

1.3.10 The Scheme is open to all Hong Kong registered companies or educational institutions[4] offering or wishing to offer training courses that meet the

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[4] The Scheme is open to all companies incorporated and registered in Hong Kong under the Business Registration Ordinance (Cap. 310), charitable bodies exempted from tax under section 88 of the Inland Revenue Ordinance, or statutory organisations in Hong Kong.

requirements under paragraph 1.3.2 to apply to have their relevant courses registered as pre-approved courses. However, the Secretariat and the Steering Committee have the final authority in determining a course provider's eligibility.

2. APPLICATION

2.1 Application Submission

2.1.1   Applications for pre-approved courses of the Scheme are accepted all the year round.

2.1.2   Course providers are advised to submit their applications at least three months before the commencement of the pre-approved course under the Scheme to allow sufficient time for the Secretariat to process the application.

2.1.3   To apply for the Scheme, a course provider should complete and submit the printed application form together with copies of the required supporting documents set out in paragraph 2.1.5 to the Secretariat via email (ptsgls_sec@hkpc.org). Submission of application by means not prescribed above will not be accepted.

2.1.4   Course providers should download application documents listed below from the website of the Scheme (ptsgls.hkpc.org). The application forms are available in English and Chinese and may be completed in either language. No application fee will be charged.

2.1.5   The following documents are required to be submitted for an application:

(A)   Duly completed and signed application form stating the information of the course provider, information on the instructor of the training course, including educational and professional qualifications, past teaching and working experience, information on the proposed training course covering objective, curriculum, schedule, nature of target participants, anticipated number of participants, deliverables, expected benefits to the Hong Kong logistics sector, etc.

(B)   Registration and supporting documents of the course provider –

(i)   Copy of Registration Certificate of the course provider showing the registered address;
(ii)   Copy of the Certificate of Incorporation and Articles of Association of the course provider;
(iii)   Curriculum of the proposed training course as sufficiently presented in its course outline, teaching materials or supplementary information, etc.;

(iv) Curriculum vitae together with copy of proof of employment of the course coordinator;

(v) Curriculum vitae together with copy of proof of qualification(s) and work experience of the course instructor / teaching staff;

(vi) Copy of publicity materials introducing the course provider's past training courses for reference (if any); and

(vii) Other documents as listed in the application form.

The original copy of the above documents may be required for verification upon request.

2.1.6 As acknowledgement of receipt will be sent to the course provider upon receipt of its application by the Secretariat. Course providers should contact the Secretariat if they for whatever reasons have not received an acknowledgement.

2.2 Application Processing

2.2.1 Applications would be processed all year round subject to the submission of the required supporting documents as mentioned in paragraph 2.1.5.

2.2.2 Applications would be processed by batches. Course providers should pay attention to the cut-off date[5] of each batch of applications, which will be announced on the Scheme's website (ptsgls.hkpc.org). Any application received by the Secretariat after a particular cut-off date will be processed together with the next batch of applications to be received by the next cut-off date.

2.2.3 The Secretariat reserves the right to seek additional information/documentary proof from course providers on their submitted applications where deemed necessary. The application would be considered withdrawn if the information/documentary proof/clarification requested by the Secretariat is not provided within 14 calendar days under normal circumstances. Unless requested by the Secretariat, supplementary information provided after submission of application may not be accepted and may not form part of the application. Incomplete application will not be processed and will be regarded as withdrawn cases.

2.2.4 The course providers should appoint a course coordinator who will act as the main contact point between the course provider and the Secretariat after the application is submitted and throughout the implementation period if the course is approved. Change of course coordinator during the period is not permitted unless with the written agreement of the Secretariat.

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[5] The cut-off date is defined as the last date to receive the application by the Secretariat to be handled in a particular period.

3. ASSESSMENT AND VETTING

3.1 Assessment Procedures

Applications received will be assessed according to the following procedures:

(A) The Secretariat will examine the applications and verify the information submitted by the course providers;

(B) The Expert Group of the PTSGLS under the Subcommittee on Industry Development (hereafter referred to as the "Expert Group"), comprising non-official members who are representatives and professionals from the logistics sector, would provide expert advice on whether the proposed courses meet the theme and objectives of the Scheme;

(C) The Steering Committee, comprising government officials from the Transport and Logistics Bureau and non-official members who are representatives and professionals from the logistics sector, would further assess all applications (except for withdrawn cases) having regard to the recommendations of the Secretariat.

Having considered the recommendations of the Secretariat and the advice of Expert Group, the Steering Committee would approve or reject the applications or request further information or clarification from the course provider for further consideration. An application that has been rejected may be resubmitted as a new application only if it has been revised substantially or supported by new information pointing to that comments made by the Steering Committee in previous assessment have been addressed. The new application will be subject to the same assessment procedures as set out in this paragraph.

3.2 Assessment Timetable

3.2.1 The actual processing time will depend on the number of applications received at the time, completeness and clarity of the information provided, etc. The Secretariat will complete the processing of a valid application and notify the course provider after receipt of a completed application accompanied by all necessary documentation proof and clarification as requested by the Secretariat. Course providers are reminded to submit the required documents as detailed in this Guide to Course Providers in a complete manner to the Secretariat. Failure to do so may cause delay in the processing of their applications.

3.2.2 To avoid confusion to the public, promotion of a training course as reimbursable and any enrolment of course participant(s) to the training course under the Scheme should only start after the receipt of the Letter of Approval of the pre-approved course by the Secretariat.

3.3 Assessment Criteria

3.3.1 Applications will be assessed based on individual merits and considered on a case-by-case basis. The criteria adopted for assessing the eligibility for registration of a training course as a pre-approved course under the Scheme include –

(A) Relevance of the proposed course content to the objectives of the Scheme;
(B) Effectiveness and distinctiveness of the proposed training course content;
(C) Quality of the teaching staff;
(D) Quality and approach in course delivery[6]; and
(E) Professional and/or academic standing of the course provider.

Course providers should refer to the detailed elaborations of the assessment criteria of the pre-approved courses under the Scheme at **Annex 1**.

3.3.2 The Steering Committee reserves the right to reject an application on grounds including but not limited to –

(a) that a petition is presented or a proceeding is commenced or an order is made or a resolution is passed for the winding up of the course provider; or
(b) that a false, inaccurate or incomplete statement or representation is contained in the application; or
(c) that the course provider is in default of its obligation(s) under another grant agreement entered into with the Government whether or not in relation to the Scheme.

3.3.3 Other factors as deemed relevant by the Secretariat and/or the Steering Committee may also be taken into consideration during application assessment.

3.3.4 The Steering Committee may review and revise the above assessment criteria from time to time as appropriate. The most updated assessment criteria would be made available on the website of the Scheme (ptsgls.hkpc.org).

3.4 Avoidance of Conflict of Interest

To avoid conflict of interest, after the submission of applications, course providers

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[6] Proposed training courses with education accreditation obtained, such as the Qualifications Framework accredited by the Hong Kong Council for Accreditation of Academic and Vocational Qualifications (HKCAAVQ) (www.hkqf.gov.hk), or other common quality assurance accreditation or certifications, such as ISO 9000, will be favourably considered for inclusion in the List of Pre-approved Courses under the Scheme.

should avoid approaching any members of the Steering Committee to discuss their applications with a view to affecting their impartiality of advice. Members of the Steering Committee who are directly or indirectly related to an application will be required to declare their interests. Where considered appropriate, the Chairperson of the Steering Committee may request members concerned to refrain from participating in the consideration of or discussion on the relevant application. The composition of the Steering Committee can be found on the website of the Scheme (ptsgls.hkpc.org).

3.5 Notification of Results

3.5.1 Course providers will be informed by the Secretariat of the results of their applications after the Steering Committee has made the decision. The Secretariat will inform the course provider concerned the reasons in case its application is rejected. An application that has been rejected may be resubmitted only if it has been revised substantially or it is supported by new information that the comments made in previous assessment have been addressed.

3.5.2 The Steering Committee's decision on the result of the application shall be final.

3.5.3 Approved courses will be published on the List of Pre-approved Courses of the Scheme with the name of course provider, course title and course fee to be shown on the Scheme website (ptsgls.hkpc.org) for public information. Successful course providers should also make their own arrangements to publicise the course information.

3.5.4 Successful course providers must clearly indicate the amount of course fee in their promotional materials.

3.5.5 The Secretariat reserves the right to announce to the public the application results, to disclose a list of successful course providers and other information of the pre-approved courses on various online and offline channels as deemed appropriate.

4. ADMINISTRATIVE AND CONTROL MEASURES

The Secretariat will take administrative and control measures on an on-going basis, for example, cross-checking with course providers to verify the validity of refund claims, updating of courses, conducting inspections and surprise visits, etc.

4.1 Review Mechanism

4.1.1 Course providers are required to review the information/ materials of the pre-approved courses on an annual basis and provide the updated

information in writing each year.

4.1.2   All pre-approved courses have a validity period of 3 years and will be subject to a review before the expiry of the validity period, through which the Secretariat would examine whether the approval should be renewed for another three years.

4.1.3   The assessment to be conducted during periodic reviews will cover but not be limited to the following:

(i)   examining the updated information of the course;
(ii)   checking the course schedule and attendance record / rate;
(iii)   ascertaining the professional qualification / recognition obtained by the course provider;
(iv)   reviewing the feedback provided by course participants who have applied for course fee reimbursement under the Scheme;
(v)   conducting onsite inspections, online inspections (for online-course) or surprise visits if needed; and
(vi)   reviewing any other information or taking any other actions as deemed necessary.

4.1.4   A course provider will be notified of the detailed arrangements upon commencement of a review. The Secretariat may take actions as deemed appropriate if irregularities of the pre-approved course are found in the course of a review. The Steering Committee reserves the right to suspend or terminate a pre-approved course if serious irregularities are found.

4.2   Record Keeping

4.2.1   To enable the Secretariat to conduct reviews and take on-going administrative and control measures, course providers are required to keep full and complete records and documents of pre-approved courses and the course participants who may claim under the Scheme for at least three years. These records include but not limited to:

(i)   participants' enrollment record (including full names and Hong Kong Identity Card ("HKID Card") numbers of participants, payment records, etc.);
(ii)   participants' attendance record (including full names and HKID Card numbers of participants, attendance rates, etc.);
(iii)   assessment on participants (including examination results, marked assignment, course completion records, etc.);
(iv)   promotion / publicity materials for the pre-approved courses (including brochures / leaflets, relevant information on websites and social media platforms, etc.);
(v)   quality assurance mechanism for the pre-approved courses (including internal review schedules, course evaluations, etc.);

(vi)   course / examination materials for the pre-approved courses (including course / examination materials for instructors and participants, etc.); and

(vii)   qualification of instructors for the pre-approved courses (including appointment criteria of course instructors, records of instructors' qualifications, etc.)

4.2.2   The following information and documentary evidence may be requested by the Secretariat for verification purpose, including but not limited to –

(i)   the latest Registration Certificate of the course providers;

(ii)   personal identification information of course participants (e.g. name, gender, HKID no., Curriculum Vitae, etc.);

(iii)   course materials of pre-approved courses (e.g. latest course curriculum, course materials for students, manuals for teaching staff, etc.);

(iv)   attendance records of course participants (e.g. attendance sheets, course completion surveys, etc.);

(v)   payment records of course participants (e.g. invoices, receipts, bank transaction record, etc.);

(vi)   in-class assessment results of course participants (e.g. results of examinations, marked assignments, in-class quizzes, etc.);

(vii)   promotional materials of pre-approved courses (e.g. pamphlets, brochures, eDM, links to websites, screenshots of online search engine and social media advertisements, etc.);

(viii)   information on the teaching staff of pre-approved courses (e.g. curriculum vitae, proof of qualification, latest appointment criteria, etc.); and

(ix)   quality assurance mechanisms of pre-approved courses (e.g. internal guidelines and review schedule, course evaluation standards, etc.).

5. ADMINISTRATIVE HIGHLIGHTS

5.1 Terms and Conditions

The terms and conditions listed in the approved application form and this Guide to Course Providers are considered legally binding between course providers and the Secretariat. Course providers are required to comply with all the terms and conditions stipulated in the approved application form, this Guide to Course Providers and the instructions and correspondences issued by the Secretariat from time to time in respect of the pre-approved courses or the Scheme. The Secretariat reserves the right to consider lapsing the approval decision in case any course provider fails to comply to the aforementioned terms and conditions without the prior approval of the Secretariat and/or provision of reasonable justifications that are deemed acceptable by the Secretariat.

5.2   Suspension or Termination

5.2.1   Any course provider who knowingly or wilfully makes a false statement, misrepresents or conceals any information in order to obtain approval under the Scheme by deception commits a criminal offence and is liable on conviction to imprisonment.

5.2.2   The Steering Committee reserves the right to suspend or terminate a pre-approved course. Circumstances which warrant suspension or termination may include but not limited to a lack of satisfactory progress, failure to produce documentary evidence to the satisfaction of the Secretariat, or if the Steering Committee sees fit to terminate the pre-approved course in public interest.

5.2.3   Once a pre-approved course is suspended or terminated, eligible participant(s) of the pre-approved course(s) provided by the course provider(s) concerned will not be entitled to the receipt of refunds under the Scheme and any cost incurred in the pre-approved course(s) will be solely borne by the course provider(s).

5.3   Safeguarding National Security

By submitting an application to the Scheme, a course provider shall acknowledge the following:

(a)   the Government reserves the right to disqualify an application on the grounds that the course provider has engaged, is engaging, or is reasonably believed to have engaged or be engaging in acts or activities that are likely to cause or constitute the occurrence of offences endangering national security or otherwise the exclusion of the course provider from future applications is necessary in the interest of national security, or is necessary to protect the public interest of Hong Kong, public morals, public order or public safety.

(b)   even after the application is approved, the Government may immediately withdraw or cancel the relevant approval, and the course provider may be liable to prosecution, upon the occurrence of any of the following events:

(i)   the course provider has engaged or is engaging in acts or activities that are likely to constitute or cause the occurrence of offences endangering national security or which would otherwise be contrary to the interest of national security;

(ii)   the continued provision of support to the course provider or the continued implementation of the pre-approved course is contrary to the interest of national security; or

(iii)   the Government reasonably believes that any of the events mentioned above is about to occur.

5.4 Participation in Publicity and Promotional Activities

Course providers, who successfully registered their course(s) under the Scheme, will be required to share the experience gained in implementing the courses approved under the Scheme with other companies and/ or organisations if so requested by the Secretariat or the Government. Such sharing may be in the form of publicity and promotional activities of the Scheme, such as seminars, workshops, conferences, exhibitions, etc., as well as site visits to the course providers as may be arranged by the Secretariat or the Government. Course providers shall allow the Secretariat or Government or any authorised person to enter at all reasonable time into and upon any premises of or controlled by the course providers for the purpose of conducting these activities. Course providers will also need to contribute inputs/materials for publication via printed/electronic channels to share their experience when being requested by the Secretariat or the Government. Course providers cannot charge fees on the Secretariat or the Government for their participation in these activities or contribution to such inputs/materials for publication. The Secretariat may also publicise the details of approved course for public information.

5.5 Acknowledgement of Support

Course providers are allowed to publicise their implementation of the pre-approved courses under the Scheme and the results on their own initiatives through publications, seminars, workshops, conferences, exhibitions, site visits, etc. with prior notice to the Secretariat. Acknowledgement of Support shall be included in any publications and publicity/media events related to pre-approved courses under the Scheme upon the request of the Secretariat and the Government. The MATF, "Door always open" and LOGSCOUNCIL logos, and the following wordings must be included in all brochures, promotional materials or any other related documents for pre-approved courses in the description of the pre-approved courses concerned:

"This course has been included in the List of Pre-approved Courses under the Maritime and Aviation Training Fund."

5.6 Handling of Information

5.6.1 The Secretariat, the Expert Group and the Steering Committee are committed to ensuring that all personal data submitted under various applications are handled in accordance with the relevant provisions of the Personal Data (Privacy) Ordinance (Cap. 486) ("PDPO"). In this regard, the personal data provided in relation to applications made under the Scheme will be used by the Government, the Secretariat, the Expert Group and the Steering Committee or their authorised agents for activities relating to:

(A) the processing and authentication of applications, disbursement of

refunds to eligible participant(s) under the Scheme; and

(B) compilation of statistics and research.

5.6.2 The personal data that course providers provide in their applications will be kept in confidence provided that such obligations and restrictions shall not apply to any disclosure which is necessary for the purposes mentioned in the paragraph above, or any disclosure which is authorised or required by law, or any disclosure which is given by the course provider /data subject.

5.6.3 If necessary, the Secretariat will contact other Government departments and relevant parties to verify the personal data provided in the applications with those held by them for the purposes mentioned in paragraph 5.6.1 above.

5.6.4 Course providers /data subjects whose personal data are collected by the Secretariat may request access to them under the PDPO. A charge will be made to cover the cost of photocopying the data supplied. In addition, if the data subject considers that the data supplied to the Secretariat is inaccurate, a request for correction of the personal data may be made in writing after a data access request has been made. Requests for access to personal data submitted under various applications under the Scheme can be made in writing to the Secretariat by returning the completed Data Access Request Form (No. OPS003 issued by the Privacy Commissioner).

5.7 Prevention of Bribery

5.7.1 Course providers shall observe the Prevention of Bribery Ordinance (Cap. 201) ("PBO") and shall procure that their teams, directors, employees, agents, consultants, contractors and other personnel who are in any way involved in the approved courses shall not offer to or solicit or accept from any person any money, gifts or advantages (as defined in the PBO) in relation to the approved course.

5.7.2 The offer of an advantage to or any member of the Steering Committee with a view to influencing the approval of an application is an offence under the PBO. Any such offer by the teams, directors, employees, agents, consultants or contractors of the course providers and/or other personnel who are in any way involved in the approved courses will render the applications concerned null and void. The Steering Committee may also cancel the approved applications and hold the relevant course providers liable for any loss or damage which the Government and/or the Steering Committee may sustain.

5.7.3 Course providers are also advised to observe the guidelines set out in the "Best Practice Checklist – Strengthening Integrity and Accountability – Grantee's Guidebook" compiled by the Independent Commission Against Corruption (ICAC) in order to conduct their pre-approved courses in an ethical and accountable manner which meets the public expectation.

5.7.4   ICAC may conduct corruption prevention reviews for course providers of the Scheme.

6.   ENQUIRIES

Enquiries regarding the Scheme can be addressed to HKPC, the Secretariat of the Professional Training on Smart and Green Logistics Scheme:

Address: HKPC Building, 78 Tat Chee Avenue, Kowloon, Hong Kong
Telephone: (852) 2788 6077
Fax: (852) 3187 4535
E-mail: ptsgls_sec@hkpc.org
Website: ptsgls.hkpc.org

**Secretariat of the Professional Training on Smart and Green Logistics Scheme
October 2024**

Maritime and Aviation Training Fund
Professional Training on Smart and Green Logistics Scheme
(PTSGLS)

Assessment Criteria for Application of Pre-Approved Courses

The following criteria will be considered in assessing the application of pre-approved courses under the PTSGLS :

A.   Relevance of the proposed course content to the objectives of the Scheme

The curriculum of the proposed training courses shall be relevant to modern, smart and green logistics, and related technologies.

The curriculum, as sufficiently presented in its course outline, teaching materials or supplementary information, etc., containing any of the following elements may be considered relevant to the logistics industry –

(a)   latest professional, technical knowledge and practical skills in advanced logistics practices on e-logistics, special cargo handling, digitalisation, blockchain, artificial intelligence, big data analytics, robotics and automation technology, cybersecurity, environmental, social and governance (ESG), etc.; and

(b)   other logistics specific topics that can be identified in standards, manuals or guidelines established by professional bodies, trade associations or other relevant organisations in the logistics industry.

Examples of relevant curriculum include but not limited to the following –

(i)   **Smart Logistics**: including e-logistics on managing the physical flows of orders that are processed on an online platform; smart operations with advance technology applications; special cargo handling such as dangerous goods, cold chain cargoes; sustainability and logistics project management, etc.

(ii) **Digitalisation**: including the latest digital knowledge and practical skills for operating the relevant applications (such as on freight management, transportation management, warehouse management), and customer service management systems, and to communicate with external systems digitally (such as block chain and API), etc.

(iii) **AI / Big Data Analytics**: including the latest AI / Big Data Analytics knowledge and practical skill to construct and make use of data-driven models to optimise the logistics operations (such as order processing, routing,

transportation, fleet and warehouse management) and improve the ability of using AI modelling to predict future trends, etc.

(iv) **Robotics / Automation Technology**: including the latest robotics / automation technology knowledge and practical skills for controlling and maintaining automatic systems (such as automatic storage and retrieval system, automatic sorting systems, automatic guided vehicles, and goods to man systems) and to design and implement robotics / automation projects, etc.

(v) **Cybersecurity:** including the latest cybersecurity knowledge and skills for the protection of handling, storage, and sharing of proprietary information created from big data, AI, automation, etc., to set proper procedures in place and deploy the right technologies to help identify, block or remediate the damage caused by any malicious attacks, etc.

(vi) **Environmental, Social and Governance (ESG):** including the latest knowledge and skills in the ESG for logistics industry such as ESG strategy, green logistics and technology, opportunities and technology applications of ESG, etc.

B. Effectiveness and distinctiveness of the proposed training course content

Considerations may include whether the proposed training courses could demonstrate any distinct, effective approach for knowledge transfer. The effectiveness of the course implementation plan, such as quantifiable key performance indicators (KPIs) and anticipated number of beneficiaries set for the course, will also be considered. The course contents should be practical, taking into account factors such as existing gaps or opportunities for growth in the skillsets of industry practitioners, the complexity of course implementation and the course duration, etc.

Points of consideration may include but not be limited to the following –

(a) introduction of fresh and innovative ideas to the proposed training course, including but not limited to unique course content, engaging activities, application of creative educational technologies, etc.;
(b) practicality of the proposed training course;
(c) optimal target and anticipated number of participants of the proposed training course; and
(d) previous performance and track record of the course provider under the Scheme/ other Government funding schemes as known to the Steering Committee and the Secretariat (if available).

C. Quality of the teaching staff

Reference will be made to the educational and professional qualifications, teaching

and working experience of the teaching staff, as well as past record as known to the Steering Committee and the Secretariat (if available).

Points of consideration may include but not be limited to the following –

    (a) affiliation of the teaching staff with accredited training centres or professional/trade bodies in the logistics industry;

    (b) educational and professional qualifications of the teaching staff awarded by relevant educational institutions, professional bodies, the Government and/or relevant organisations in the logistics industry; and

    (c) work experience in the industry and teaching experience in the relevant field(s) of expertise of the teaching staff.

D.   Quality and approach in course delivery

Considerations may include the academic credibility and the degree of industry recognition of the certification and professional qualification awarded by the proposed training courses, as well as the quality assurance mechanism implemented in the course.

Points of consideration may include but not be limited to the following –

    (a)   recognition by the Government;

    (b)   recognition by professional or trade bodies (associations / societies / institutes, etc.) in the logistics industry;

    (c)   sufficient demonstration by the course providers on the reputation and receptiveness of their courses in the logistics industry. For example, course providers may demonstrate its present and past partnership and collaborations with industry associations and organisations or their corporate members;

    (d)   the quality assurance mechanism may be demonstrated by the accreditation from relevant professional or trade bodies in the logistics industry or the Government;

    (e)   course providers are encouraged to seek common education accreditation, such as recognition under the Qualifications Framework accredited by the Hong Kong Council for Accreditation of Academic and Vocational Qualifications (HKCAAVQ), or other common quality assurance accreditation or certifications, such as ISO 9000; and

    (f)   course providers may also develop their own quality assurance mechanism to meet their training objectives with sufficient demonstration in their applications for consideration. Quality assurance approaches may include a robust mechanism for programme development with periodic review, appointment criteria for course instructors, systemic collection of feedback from participants, staff or instructors, etc. which provides performance indicators and seeks to identify areas for improvement.

E. **Professional and/or academic standing of the course provider**

Considerations will be given to the academic credibility and the degree of industry recognition of the course providers, their expertise, capabilities and experience relating to the delivery of logistics-related training courses, as well as their past record as known to the Steering Committee and the Secretariat if available.

The professional or academic standing of the course providers should be recognised by the logistics industry. The following list of companies / organisations / institutions, as well as the those accredited, certified, associated or recognised by them, may serve as supporting party in demonstrating the professional and/or academic standing of the course providers –

(a) Government;
(b) statutory or advisory bodies and their subsidiaries, such as Hong Kong Productivity Council, etc.;
(c) University Grants Committee (UGC)-funded and Government established universities and their continuing and professional education arms;
(d) Vocational Training Council and its member institutes;
(e) self-financing higher education institutions that provide locally-accredited or continuous learning programmes registered with or exempted by the Education Bureau;
(f) professional or trade bodies or accredited training centres of these professional or trade bodies; and
(g) logistics industry practitioners.

Course providers falling outside the above list are required to provide further information on their companies/organisations/institutions, including but not limited to the establishment year, teaching staff portfolio, past course participants, partnering organisations, course lists, etc., for assessment.

Other factors deemed relevant by the Secretariat and/or the Steering Committee may also be taken into consideration during application assessment.