

Guidelines on Application for Recognition of Category C “Self-selected Activities” under the Continuing Professional Development Schemes for Tourist Guides and Tour Escorts

Under the Travel Industry Ordinance, those applying for renewal of a tourist guide / tour escort licence must have completed the Continuing Professional Development Scheme (CPD Scheme) for Tourist Guides / Tour Escorts specified by TIA^{1&2}. Licensed tourist guides / tour escorts may complete Self-selected Activities (i.e. Category C activities) by the following routes:

- (1) Participating in activities recognized by TIA (please refer to the [list of recognized TG CPD activities](#) and [list of recognized TE CPD activities](#) published in TIA website); or
- (2) Participating in non-TIA recognized activities and complying with the requirements set out in these Guidelines.

Only activities completed within the validity period of the relevant licences (CPD period) are accepted as complying with the CPD Scheme requirement. In other words, activities completed after the licence has already expired will not be accepted. In addition, any activity completed for more than once in the same CPD period will only be accepted once for the purpose of the CPD Scheme.

Participating in TIA recognized activities

Licensed tourist guides / tour escorts having participated in an activity recognized by TIA must retain the attendance record or document(s) indicating completion of the activity, and provide the relevant document(s) to TIA when applying for renewal of the licence.

Participating in non-TIA recognized activities

Licensed tourist guides / tour escorts wishing to participate in activities not yet recognized by TIA must, before participating in the activities, apply for recognition and, **within 3 months from the day on which the activities are completed**, provide TIA with further information and/or document(s) to complete the application. Such applications, however, are subject to the risk of refusal if the activities do not comply with the criteria for recognition.

¹ Holders of pre-existing tour escort passes (issued by the Travel Industry Council of Hong Kong) taken to be tour escort licences applying for renewal of their licences for the first time are exempted from complying with the CPD Scheme requirement.

² Details of the CPD Schemes may be found in the following web pages: <https://www.tia.org.hk/en/licensing/tourist-guides/licensing-and-renewal-criteria/CPD-scheme.html> (CPD Scheme for Tourist Guides); <https://www.tia.org.hk/en/licensing/tour-escorts/licensing-and-renewal-criteria/CPD-Scheme.html> (CPD Scheme for Tour Escorts).

It normally takes **four weeks** after TIA has received an application for recognition (including all required information and/or documents) to complete vetting. An activity will be recognized by TIA only if it meets all the relevant CPD Scheme criteria. To avoid the situation where an activity having been completed is not recognized, TIA recommends licensed tourist guides / tour escorts to obtain approval for their applications before participating in the activities.

Criteria for recognition of Self-selected Activities

Type of organizers

In-house training activities conducted by travel agents or private tuition **will not be recognized**. Generally, only activities organized by the following types of institutions are recognized:

Institutions in Hong Kong:

- Schools registered with the Education Bureau of Hong Kong
- Course providers recognised by the Employees Retraining Board
- Course providers recognised under the Continuing Education Fund
- Travel industry related organisations or professional bodies
- Non-profit or charity organisations regulated by the government
- Organizations that are accredited to award local or international qualifications.
- Organizations that are recognized by the Insurance Authority in providing CPD activities (the activity must be approved by the Insurance Authority and relates to the job duties of tourist guides / tour escorts).

Institutions outside Hong Kong

- Education institutions recognised by the local government
- Internationally recognised professional organisations

Mode of activities

Generally, only activities conducted in the following modes are recognized:

- Training courses
- Seminars and forums
- Visits and study tours
- Workshops

Subject of activities

The subject of the activities must relate to the tasks of tourist guides / tour escorts (**Annex**) set out in *The Specification of Competency Standards* formulated by the Industry Training Advisory Committee of the travel industry under the Hong Kong Qualifications Framework. Applicants must state in the application how the activities can assist them to carry out the said tasks.

Recognized CPD hours

TIA reserves the right to accept (if so, and to adjust) or not to the activity hours stated in the supporting documents. For example, travel time to the location of an outdoor activity, free time or meal breaks etc. will not be accepted as recognized CPD hours. TIA will confirm the number of approved CPD hours of the relevant activities after vetting the application.

If an activity relates to the task(s) of both tourist guides and tour escort, those holding **both** a tourist guide licence **and** a tour escort licence may have the relevant CPD hours reckoned in the relevant CPD periods of both the CPD Schemes.

Supporting documents to be submitted

Applicants are required to provide the following document(s):

- Promotion material(s) or other relevant documents issued by the organizer showing the following information:
 - Name of activity;
 - Name of organization and its contact details;
 - Date and time of activity;
 - Mode of activity; and
 - Contents of activity.
- Supporting document(s) issued by the organizer showing that the applicant has completed the relevant activity* such as:
 - Certificate of graduation;
 - Certificate of study;
 - Certificate of attendance; or
 - Attendance record that specified the number of hours attended.

Note: If an applicant has not completed the activity when submitting the application for recognition, the applicant must submit the above supporting document(s) **within 3 months from the day the activity is completed.**

Table 1 – Tasks of Tourist Guides

| Functional Area | Function | Task |
|-------------------------------|---|---|
| Travel consultation and sales | Write and apply for tenders (study and exchange tour, MICE travel) | Master effective presentation skills |
| Tour operations | Operations of inbound tour | Make preliminary preparations prior to receiving inbound tours groups |
| | | Provide customer service to inbound tour group during a tour |
| | | Provide hotel information and check-in service to inbound tour groups |
| | | Arrange catering, guided sightseeing and shopping activities for inbound tour groups |
| | | Manage inbound tour return arrangements and trip reviews |
| | | Understand the historical background, tourist attractions and social situation of Hong Kong |
| | | Understand the culture and habits of international tourists |
| | Operations of distinctive tourism (including ecological tourism, cruise travel, and study and exchange tour etc.) | Perform ecological and green tour operations |
| Customer service | Provide excellent customer services | Provide value-added services |
| | | Solve common customer problems |
| Risk and crisis management | Identify the potential risks of various tourism activities | Recognise the potential risks of various tourism activities |
| | Reduce the risks and losses during the journey | Perform risk management of transportation and vehicle operators |
| | | Perform risk management for hotels and restaurants |
| | | Perform risk management of itinerary activities and sightseeing spots |
| | | Perform risk management of tourist guides or tour escorts |

Annex 1 – Tasks of Tourist Guides (continued)

| Functional Area | Function | Task |
|---|---|---|
| Risk and crisis management (cont'd) | Coordinate and handle crisis during the journey | Handle tourist disputes and complaints |
| | | Follow-up on travel insurance compensation and refund matters |
| | | Master basic first aid knowledge |
| | | Handle unexpected incidents |
| Operating management and administrative support | Implement compliance management | Abide by professional ethics |

Annex 2 – Tasks of Tour Escorts

| Functional Area | Function | Task |
|-------------------------------|--|---|
| Travel consultation and sales | Conduct sales activities | Understand the factors that influence customers to purchase tourism products |
| | | Recommend tourism products and information that meet customer needs |
| | | Sell tourism products |
| | | Use the sales system to book tourism products and services |
| | | Provide after-sales service for tourism products |
| Tour operations | Operations of outbound tour | Make preliminary preparations prior to the departure of the outbound tour groups |
| | | Provide customer service to outbound tour group during a tour |
| | | Provide hotel information and check-in service during an outbound tour |
| | | Arrange catering, guided sightseeing and shopping activities for outbound tour groups |
| | | Manage outbound tour return arrangements and conclude the tour |
| Customer service | Provide excellent customer services | Provide value-added services |
| | | Solve common customer problems |
| | | Arrange cancellation/transfer of tour group and refunds of tourism products |
| Risk and crisis management | Identify the potential risks of various tourism activities | Recognise the potential risks of various tourism activities |
| | | Conduct risk analysis and assessment of tourism activities |
| | Reduce the risks and losses during the journey | Perform risk management of transportation and vehicle operators |
| | | Perform risk management for hotels and restaurants |
| | | Perform risk management of itinerary activities and sightseeing spots |
| | | Perform risk management of tourist guides or tour escorts |

Annex 2 – Tasks of Tour Escorts (continued)

| Functional Area | Function | Task |
|---|--|---|
| Risk and crisis management (cont'd) | Coordinate and handle crisis during the journey | Handle tourist disputes and complaints |
| | | Follow-up on travel insurance compensation and refund matters |
| | | Master basic first aid knowledge |
| | | Handle unexpected incidents |
| Public relations, marketing and internal communications | Establish company's brand image | Implement brand promotion strategy |
| | Arrange promotion activities | Conduct promotion activities |
| Operating management and administrative support | Oversee the operations and management of branch stores according to the administrative standards | Oversee the daily operations of a branch store |
| | Implement compliance management | Abide by professional ethics |