

Towards an Integrated Pilgrimage Services: A Religious Tourism Framework for Optimising Quality and Value Capture

Islamic religious pilgrimages, namely Hajj and Umrah, are increasingly important amongst Muslims globally and in Indonesia. Indeed, Indonesia is among the world's largest senders of Hajj and Umrah pilgrims, with around 241,000 Hajj pilgrims in 2024 and more than 1.5 million Umrah pilgrims annually. Yet, this pilgrimage economy only produces a limited domestic economic capture, as only about 30% of the spending is estimated to return as inward spending. This pattern suggests weak domestic value-chain integration and fragmented multi-actor governance, both of which can undermine the consistency and reliability of the pilgrimage experience. With this perspective, this study aims to develop a conceptual and policy-oriented framework for strengthening Indonesia's Hajj-Umrah ecosystem through a religious tourism lens by conceptualising pilgrimage as an integrated service ecosystem. The research is motivated by a key gap in pilgrimage and religious tourism studies. While prior work often emphasises spiritual motives and pilgrim satisfaction, fewer studies specify how ecosystem governance actor roles, coordination mechanisms, and end-to-end service linkages systematically shape both the quality of the sacred journey and domestic value creation in a major sending country. The research employs a qualitative research method combining a desk study of regulations and institutional arrangements, a synthesis of ecosystem theory, and stakeholder mapping based on the pilgrim consumer journey. Primary data will be collected through detailed interviews and group discussions with key stakeholders (such as regulators, academics, industry professionals, and related organisations) to confirm the definition of the Hajj-Umrah ecosystem, the roles of stakeholders, and the connections among services. Expected outputs include an operational definition of the Hajj-Umrah ecosystem as a religious tourism ecosystem oriented to safeguarding and enhancing the sacred experience; an end-to-end map of actors, activities, and critical service interfaces affecting pilgrim safety, health, guidance, and travel continuity; and governance recommendations to strengthen orchestration, cross-sector collaboration, and domestic value chain integration to improve inward economic capture. The study's scholarly contribution is expected to advance religious tourism literature by introducing an ecosystem-governance approach that links pilgrimage experience quality (including service reliability supporting spiritual well-being) with multilateral coordination and value-capture mechanisms in large sending countries. In practical terms, the study is expected to generate policy-relevant insights for improving pilgrim protection and satisfaction while expanding domestic participation in supporting industries within the Hajj-Umrah ecosystem.

Keywords: Religious Tourism; Pilgrimage; Service Ecosystem; Ecosystem Governance; Value Capture.

1 Introduction

2
3 Every year, millions of Muslims from across the globe converge on the Holy
4 Cities of Mecca and Medina to perform Hajj or Umrah, or engage in religious
5 tourism more generally, as the most spiritually significant acts of worship in
6 Islam. For Indonesia, the world's most populous Muslim-majority nation, this
7 pilgrimage is not merely a matter of individual faith. With roughly 87 per cent
8 of its 286 million citizens being Muslim, Hajj and Umrah have become a
9 defining feature of the country's social and economic landscape. In 2024, some
10 241,000 Indonesians performed Hajj, while annual Umrah departures have long
11 exceeded 1.5 million, figures that place Indonesia firmly at the top of global
12 pilgrimage statistics.

13 The economic dimensions of this movement are hard to overstate.
14 Aggregate spending tied to Indonesian Hajj and Umrah activities is estimated at
15 IDR 20 trillion per year for Hajj and IDR 30-40 trillion for Umrah, touching
16 sectors as varied as financial services, transportation, accommodation, catering,
17 healthcare, halal retail, and telecommunications. And yet, available evidence
18 suggests that only around 25-35 per cent of this spending returns to Indonesia as
19 inward spending, with the majority flowing outward to foreign providers,
20 particularly in Saudi Arabia (BPKH, 2025). This pattern indicates that despite
21 the substantial economic activity generated by Indonesian pilgrims, the majority
22 of its value is not retained within the domestic economy. This suggests that
23 Indonesian pilgrims generate wealth on a massive scale, but most of it does not
24 stay in Indonesia.

25 This is not simply a matter of economic leakage. It reflects two deeply
26 connected structural problems. First, the governance of the Hajj-Umrah
27 ecosystem is fragmented. Dozens of actors are involved, such as government
28 ministries, financial institutions, private travel operators, civil society groups,
29 and international partners, but their roles, relationships, and incentives are poorly
30 coordinated. No single institution holds the authority or capacity to align them
31 effectively. Second, and relatedly, the quality of the pilgrimage experience itself
32 is uneven. When actors operate in silos and services are poorly integrated, the
33 consequences fall directly on pilgrims, including inconsistent health protocols,
34 logistical breakdowns, inadequate guidance, and gaps in protection that can turn
35 a sacred journey into a stressful one.

36 These problems are well known to practitioners and policymakers, but the
37 scholarly literature has been slower to catch up. Research on Hajj and Umrah
38 has tended to focus on individual pilgrims, their motivations, their satisfaction
39 levels, and their health outcomes (Elgammal et al., 2023; Yezli et al., 2024). Far
40 less attention has been paid to the ecosystem structure and governance that
41 organise and deliver pilgrimage services. Even less has been written about how
42 governance arrangements in sending countries like Indonesia shape both the
43 quality of the experience and the economic value retained at home. This gap is
44 what the present study seeks to address.

45 With these perspectives in mind, this study pursues three interrelated
46 objectives. First, it develops an operational definition of the Hajj-Umrah

1 ecosystem rooted in contemporary ecosystem theory. Second, it maps the actors,
2 activities, positions, and linkages that constitute its structural architecture along
3 the pilgrim consumer journey. Third, it identifies the governance mechanisms,
4 particularly boundary-spanning and orchestration functions, that can strengthen
5 coordination, service integration, and domestic value capture. The overarching
6 argument advanced in this study is that improving the quality of the pilgrimage
7 experience and strengthening domestic value capture are not competing
8 objectives but are, rather, mutually reinforcing dimensions of a well-governed
9 pilgrimage ecosystem.

10 The paper proceeds as follows. Section 2 reviews the relevant literature on
11 religious tourism, ecosystem theory, and governance. Section 3 describes the
12 research method. Section 4 presents findings, including the ecosystem definition,
13 stakeholder map, analysis of governance challenges, and an integrated policy
14 framework. Section 5 concludes with a discussion of theoretical contributions,
15 practical implications, and directions for future research.

18 **Literature Review**

20 *Religious Tourism, Pilgrimage, and Service Quality*

22 Religious tourism is among the oldest forms of human travel. Long before
23 the modern tourism industry existed, people journeyed across continents to visit
24 sacred sites, seek healing, fulfil vows, or deepen their spiritual lives (Timothy &
25 Olsen, 2006; Ohlan & Ohlan, 2024). Pilgrimage represents the most intense
26 expression of this impulse, a journey undertaken not for leisure or curiosity but
27 for purposes that are fundamentally sacred. Scholars have drawn a useful
28 distinction between religious tourism broadly defined and pilgrimage
29 specifically, noting that pilgrimage involves a more structured ritual process,
30 a stronger expectation of personal transformation, and a tighter relationship
31 between the journey and a particular tradition of faith (Collins-Kreiner, 2010).

32 Within this field, Hajj and Umrah occupy a category of their own. No other
33 pilgrimage attracts anything close to the annual volume of participants, nor
34 involves the same degree of logistical complexity on a global scale. Over the
35 past two decades, an increasingly substantial body of research has examined
36 various dimensions of the Hajj and Umrah experience, from what motivates
37 pilgrims to undertake the journey (Zamani-Farahani & Henderson, 2010;
38 Elgammal et al., 2023) to how they evaluate the quality of services received (Al-
39 Ansi & Han, 2019; Quaium et al., 2023) to the significant public health
40 challenges posed by mass gatherings of this scale (Memish et al., 2014; Yezli et
41 al., 2024). More recently, researchers have begun examining the institutional and
42 governance dimensions of pilgrimage management, recognising that the quality
43 of the sacred journey cannot be separated from the quality of the systems behind
44 it (Taibah & Arlikatti, 2015).

45 What remains comparatively underexplored, however, is a systemic view of
46 how pilgrimage services are integrated, or fail to be, across the full journey. Most

1 studies examine discrete aspects of service provision in isolation:
2 accommodation here, transportation there, health services somewhere else. Few
3 have asked how these components fit together as a system, where the critical
4 failure points are, and how institutional arrangements in the sending country
5 shape both the pilgrim's experience and the economic value that remains at home
6 after the journey is done. This is the gap the present study directly confronts.

7
8 *Ecosystem Theory: From Business to Service Ecosystems*

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10 The idea that organisations do not act in isolation but as part of larger,
11 interdependent communities of actors has gained considerable traction in
12 management and strategy research over the last three decades. Moore (1996) was
13 among the first to articulate this insight systematically, drawing a deliberate
14 analogy between biological ecosystems and the economic communities in which
15 businesses operate. His central argument was that competitive success depends
16 less on defeating specific rivals within a bounded industry than on co-evolving
17 productively with a wider network of actors, suppliers, customers, partners,
18 regulators, and others, toward shared purposes. This reframing had significant
19 implications: it shifted attention from dyadic competition to systemic co-creation
20 and from industry structure to network dynamics. Within the tourism context
21 specifically, destinations have been conceptualised as business ecosystems
22 comprising networks of interdependent public and private stakeholders, in which
23 strategic alignment among actors is critical for value co-creation and sustainable
24 competitive advantage (Selen & Ogulin, 2015).

25 Building on this foundation, Adner (2016) introduced a more precise and
26 operationally tractable conception of what an ecosystem actually is. He
27 distinguished between what he called "ecosystem-as-affiliation," essentially a
28 loose community of actors gathered around a focal firm or platform, and
29 "ecosystem-as-structure," which he defined as "the alignment structure of the
30 multilateral set of partners that need to interact in order for a focal value
31 proposition to materialise. This second conception is analytically more
32 demanding but also more useful as it forces attention onto four specific structural
33 components, activities, actors, positions, and linkages and asks how they must
34 be configured for the ecosystem's core purpose to be realised.

35 Vargo and Lusch (2017), working within the tradition of service-dominant
36 logic, offered a complementary view centred on value co-creation rather than
37 structural configuration. A service ecosystem, in their account, is a relatively
38 self-contained system of resource-integrating actors bound together by shared
39 institutional arrangements and engaged in ongoing, mutual value creation
40 through service exchange. What makes this perspective valuable for
41 understanding pilgrimage is its insistence that value is not simply produced by
42 providers and consumed by pilgrims; it emerges from their interactions. The
43 quality of the Hajj or Umrah experience is not something airlines and hotels
44 deliver; it is something pilgrims passively receive. It is something that takes
45 shape throughout the journey's texture, including the pilgrim's own preparation,
46 engagement, and responsiveness to the services around them.

1 Koch et al. (2022) extended this body of thinking into the digital domain,
2 defining a digital ecosystem as a socio-technical system that connects providers
3 and consumers of assets through digital platforms, enabling brokering,
4 scalability, and positive network effects. In the context of Hajj and Umrah, this
5 lens is increasingly pertinent. Saudi Arabia's *Nusuk* platform now mediates
6 access to a wide range of pilgrimage services, while Indonesia's SISKOHAT
7 system manages domestic registration and quota data. These digital architectures
8 are reshaping the ecosystem in significant ways. Yet the potential of digital
9 integration to improve service quality and enhance domestic value capture
10 remains, for now, only partially realised.

11 Taken together, these four perspectives offer distinct yet mutually
12 reinforcing ways of viewing the Hajj-Umrah system. For the purposes of this
13 study, Adner's structural framework serves as the primary analytical lens as its
14 precision makes it well-suited to the mapping task at hand. But it is enriched by
15 Moore's attention to co-evolution, Vargo and Lusch's emphasis on value co-
16 creation, and Koch et al.'s insights into digital enablement.

17
18 *Ecosystem Governance: Orchestration, Boundary-Spanning, and Collaborative*
19 *Governance*

20
21 Mapping an ecosystem's structure is one thing; making it function well is
22 quite another. The governance question, how the system is steered, coordinated,
23 and held accountable, is in many ways the harder problem, and it has attracted
24 growing scholarly attention in recent years. Autio and Thomas (2021)
25 approached this question through the concept of ecosystem orchestration, which
26 they defined as the process of coordinating autonomous yet interdependent
27 actors toward a shared, system-level value proposition without relying on
28 hierarchical authority. Orchestration, in their account, works through four
29 interdependent layers: technological (shared platforms and interoperability
30 standards), economic (incentive structures that align individual and collective
31 interests), institutional (rules, roles, and accountability mechanisms), and
32 behavioural (norms, trust, and the willingness to collaborate). The challenge is
33 that all four layers must work in concert. Weakness in any one can unravel the
34 others.

35 Schotter et al. (2017) contributed a related but distinct concept: the
36 Boundary-Spanning Organization (BSO). Where orchestration focuses on
37 system-level coordination, boundary-spanning focuses on the actors who bridge
38 gaps between institutions, sectors, cultures, and geographies. BSOs are entities
39 designed specifically to connect parties that would otherwise struggle to interact
40 effectively. They do this through five types of activity: ambassador activities
41 (representing the system externally, maintaining its legitimacy), task coordinator
42 activities (aligning the work of different actors), scout activities (monitoring the
43 environment for risks and opportunities), guard activities (protecting the system
44 from external disruption), and service delivery activities (bridging organisational
45 standards with the actual needs of end users). In a system as institutionally

1 diverse and geographically dispersed as the Hajj-Umrah ecosystem, the need for
2 such bridging capacity is acute.

3 Ansell and Gash (2007) offered a third angle, focusing on the conditions
4 under which multi-stakeholder collaboration can produce legitimate and durable
5 governance outcomes. Their collaborative governance framework identifies
6 several key determinants of success: the clarity and fairness of institutional
7 design, the quality of facilitative leadership, the degree of trust among
8 participants, and the history of prior cooperation or conflict. Applying their
9 framework to the Hajj and Umrah context adds an important normative
10 dimension: collaboration here is not only an institutional design challenge but a
11 moral one, shaped by Islamic principles of *Shura* (deliberative consultation),
12 *Amanah* (trustworthiness), and *Maslahah* (collective welfare). These values are
13 not external constraints on governance design; they are part of what gives the
14 system its legitimacy in the eyes of the millions who depend on it. This
15 imperative for inclusive stakeholder participation is particularly salient in
16 tourism-dependent communities, where local actors must be meaningfully
17 involved in governance structures to ensure tourism development generates
18 equitable outcomes (Thetsane, 2019).

19 20 *Conceptual Framework*

21
22 The framework guiding this study brings these theoretical threads together.
23 The Hajj-Umrah Ecosystem is conceived as a structured, multilateral system of
24 actors, activities, positions, and linkages, grounded primarily in Adner's (2016)
25 ecosystem-as-structure approach, with a focal value proposition rooted in the
26 laws related to the management of Hajj and Umrah as well as the financial
27 management, including the delivery of accountable, high-quality pilgrimage
28 services that support Indonesian pilgrims in achieving a *mabrur* Hajj or Umrah.
29 This framework is enriched by the value co-creation dynamics highlighted by
30 Vargo and Lusch (2017), the digital enablement perspective of Koch et al.
31 (2022), and the governance mechanisms of orchestration (Autio & Thomas,
32 2021), boundary-spanning (Schotter et al., 2017), and collaborative governance
33 (Ansell & Gash, 2007). Critically, domestic value capture is treated not as a
34 peripheral economic consideration but as an integral dimension of ecosystem
35 performance, inseparable from the quality of the pilgrimage experience itself.

36 37 38 **Research Methods**

39 40 *Research Design*

41
42 This study adopts a qualitative, exploratory research design, consistent with
43 established traditions in qualitative inquiry in social research (Creswell &
44 Creswell, 2018). The choice reflects the nature of the problem at hand:
45 conceptualising a complex, multi-actor institutional system cannot be
46 accomplished through quantitative measurement alone. What is needed is a

1 mode of inquiry that can capture structural relationships, institutional dynamics,
2 and the meanings that actors assign to their roles within the system. Qualitative
3 methods are well-suited to this task.

4 The research unfolded in two phases. The first phase was conceptual,
5 centred on a systematic review of the relevant literature and a theoretical
6 synthesis across ecosystem theory, governance frameworks, and religious
7 tourism scholarship. This produced the conceptual scaffolding for the ecosystem
8 framework developed. The second was an empirical phase, in which primary
9 data collected from key stakeholders were used to ground, refine, and stress-test
10 the conceptual framework against the realities of Indonesian Hajj-Umrah
11 governance.

12 *Data Collection*

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15 Secondary data were gathered through a desk study drawing on academic
16 literature, institutional reports, and regulatory documents. Key regulatory
17 sources included Law Number 14 of 2025 on Hajj and Umrah Pilgrimage
18 Organization, Law Number 34 of 2014 on Hajj Financial Management, and
19 Presidential Instruction Number 15 of 2025 on the development of Indonesia's
20 Hajj Village in Mecca. Institutional reports from BPKH, the Ministry of Hajj
21 and Umrah, and Danantara were also incorporated.

22 Primary data were collected through two complementary methods: focus
23 group discussions (FGDs) and in-depth interviews. Participants were selected
24 through purposive sampling to ensure representation from all major stakeholder
25 groups in the Hajj and Umrah ecosystem. Key informants were drawn from the
26 following institutions: (1) the Ministry of Hajj and Umrah (Kementerian Haji
27 dan Umrah); (2) the Hajj Financial Management Agency (BPKH); (3)
28 Danantara; (4) the National Committee for Islamic Economy and Finance
29 (KNEKS); (5) the Indonesian Ulema Council (Majelis Ulama Indonesia/MUI);
30 (6) registered Hajj and Umrah travel operators; and (7) academic experts in
31 Islamic economics and pilgrimage management. FGDs facilitated the
32 observation of inter-stakeholder dynamics and validation of the ecosystem
33 definition and stakeholder mapping, while in-depth interviews enabled deeper
34 exploration of individual institutional knowledge, governance challenges, and
35 strategic priorities.

36 *Data Analysis*

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39 Data analysis was conducted using thematic analysis following Braun and
40 Clarke (2006). The coding process identified overarching themes and conceptual
41 relationships across the data, which were subsequently integrated with the
42 theoretical framework to produce the final conceptual model. To ensure
43 trustworthiness, findings from the desk study, FGDs, and in-depth interviews
44 were triangulated, and preliminary results were shared and discussed with key
45 informants before finalisation.

46

Findings and Discussion

Conceptualising the Hajj-Umrah Ecosystem: Theoretical Grounding

A recurring problem in policy discussions about Hajj and Umrah management in Indonesia is the absence of a shared, operationally precise definition of the ecosystem itself. Stakeholders from different institutions often mean quite different things when they use the term, which makes coordinated action difficult. Developing a common definition was therefore the first and most foundational task of this study.

To do so, a systematic evaluation of the four ecosystem frameworks reviewed in Section 2 against the empirical characteristics of the Indonesian pilgrimage context was conducted. Moore's (1996) business ecosystem model offers a useful intuition: like a business ecosystem, the Hajj-Umrah ecosystem involves a diverse community of co-evolving actors who must collaborate and compete simultaneously to create value. But Moore's framework is too diffuse for policy purposes; it does not specify what actors must do, in what sequence, or how their activities must be connected. Vargo and Lusch's (2017) service ecosystem perspective offers important insights into value co-creation, but, like other perspectives, it lacks the structural specificity needed for mapping and governance design. Koch et al.'s (2022) digital ecosystem model is relevant to the platform dimensions of Hajj-Umrah management, but its emphasis on digital brokering leaves institutional and regulatory dimensions underspecified.

Adner's (2016) ecosystem-as-structure approach addresses these limitations most directly. By centring analysis on four structural components, activities, actors, positions, and linkages, it provides a precise and operationally tractable template for mapping the ecosystem and identifying where alignment failures occur. Its analytical attention to the conditions under which a focal value proposition can or cannot be realised maps directly onto the governance and coordination questions at the heart of this study. This study, therefore, adopts Adner's framework as its primary analytical foundation, supplemented by insights from the other three perspectives.

Figure 1. Stakeholder Mapping of the Hajj and Umrah Ecosystem



Source: Authors' Analysis (2025)

1 Drawing on this theoretical synthesis and informed by the empirical findings
 2 from IDIs and FGDs, we define the Hajj-Umrah Ecosystem (EHU) as *"the*
 3 *alignment structure of activities, actors, positions, and linkages comprising the*
 4 *multilateral relationships among diverse stakeholders who must collaborate*
 5 *cohesively to deliver accountable Hajj and Umrah pilgrimage services with*
 6 *service excellence for Indonesian pilgrims, in pursuit of the ultimate objective of*
 7 *a mabrur Hajj and Umrah."* This definition makes the focal value proposition
 8 explicit, accountable, and high-quality pilgrimage services that enable the sacred
 9 objective to be realised and frames the entire structural architecture as a means
 10 toward that end.

11 *Structural Elements of the Hajj-Umrah Ecosystem*

12 Drawing on the integrated ecosystem framework developed in this study,
 13 the structural architecture of the Hajj-Umrah Ecosystem can be mapped across
 14 four key dimensions: activities, actors, positions, and linkages.

15 1. Activities and services

16 The pilgrim's journey, from the moment of registration to the return
 17 home, generates demand across an extraordinarily wide range of service
 18 categories. These include financial and Islamic investment management,
 19 healthcare, tour and travel services, hospitality and accommodation,
 20 catering and food processing, transportation and logistics, retail and
 21 trade, property and real estate, education and training, information
 22 technology, media and communications, telecommunications, and
 23 personal care. Beyond these service activities, the ecosystem also
 24 encompasses a set of non-service functions that are no less important:
 25 regulation and policy formulation, the pilgrimage act itself (performed
 26 by pilgrims as the ecosystem's primary beneficiaries), and research,
 27 development, and other enabling activities.

28 2. Actors and stakeholders

29 The study identifies seven principal groups. *First*, regulators, led by the
 30 Ministry of Hajj and Umrah (Kemenhaj) and supported by a range of
 31 other government bodies, are responsible for formulating policy, setting
 32 service standards, and ensuring compliance across the ecosystem.
 33 *Second*, pilgrims, whether performing Hajj or Umrah independently or
 34 through guided groups, constitute the demand side of the ecosystem and
 35 are the primary beneficiaries of its focal value proposition. *Third*,
 36 operator and organiser institutions, including airlines, travel agencies,
 37 accommodation and catering providers, transporters, and
 38 telecommunications companies, design and deliver end-to-end service
 39 packages for pilgrims. *Fourth*, financing institutions provide *Sharia*-
 40 compliant savings, payment, and financing products that enable pilgrims
 41 access to the pilgrimage; BPKH and Islamic banks are the central actors
 42 in this group. *Fifth*, investment institutions manage and grow the
 43 accumulated Hajj and Umrah funds in accordance with *Sharia* principles;
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1 BPKH, BPKH Limited, Danantara, and other state-owned investment
 2 entities occupy key positions here. *Sixth*, the halal supporting industry
 3 and *dam* (compensation) management institutions: the former comprises
 4 small and medium enterprises, cooperatives, village-owned enterprises,
 5 and Islamic boarding schools that produce and supply goods and services
 6 supporting the pilgrimage experience; the latter collects and distributes
 7 dam payments and qurban in accordance with *Sharia* requirements.
 8 *Seventh*, and finally, research, development, and enabler actors,
 9 including educational institutions, research centres, professional
 10 associations, media organisations, and Islamic civil society bodies,
 11 generate the knowledge, innovation, and institutional capacity on which
 12 the ecosystem's long-term sustainability depends.

13 3. Positions

14 The ecosystem's architecture unfolds across five principal phases of the
 15 pilgrim consumer journey: registration and Hajj savings; the waiting
 16 period and financial management; departure preparation; pilgrimage
 17 performance through to return; and the post-pilgrimage phase. Different
 18 actor groups are engaged to varying degrees across these phases, such as
 19 operators and financial institutions, involved throughout, and others
 20 playing more concentrated roles at specific junctures.

21 4. Linkages

22 Four types of flows animate the connections between actors and
 23 activities. Financial flows capture payment streams, financing
 24 arrangements, and investment returns. Information flows include the data
 25 exchange, coordination signals, and communication that keep services
 26 synchronised. Service flows represent the actual delivery of pilgrimage-
 27 related services to pilgrims. Meanwhile, influence flows encompassing
 28 both persuasive forms, such as religious guidance and fatwa, and
 29 authoritative forms, such as binding regulations, shape the decisions and
 30 behaviours of actors throughout the system.

31 *The Role of Boundary-Spanning Organisation in the Hajj-Umrah Ecosystem*

32 The governance challenges described above provide important context for
 33 understanding the critical need for a boundary-spanning mechanism within the
 34 ecosystem. The empirical findings from IDIs and FGDs reveal that despite the
 35 richness and diversity of the ecosystem, its day-to-day functioning is marked by
 36 coordination gaps and integration failures that undermine both service quality
 37 and domestic value capture. The most pervasive of these is fragmentation: actors
 38 across all stakeholder groups operate largely within their institutional silos, with
 39 few effective mechanisms for joint planning or cross-actor coordination.
 40 Furthermore, the dominance of foreign providers in high-value segments of the
 41 pilgrimage service chain, along with the weakness of enabling infrastructure for
 42 digital interoperability, compounds these challenges. These governance gaps
 43 collectively point to the need for a mechanism to bridge the institutional,
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1 functional, sectoral, and geographical boundaries that currently fragment the
2 ecosystem.

3 The governance challenges described above share a common root: the
4 ecosystem lacks an actor with the mandate, capacity, and institutional
5 positioning to bridge the boundaries that currently fragment it. This is precisely
6 the function that the Boundary-Spanning Organisation (BSO) framework of
7 Schotter et al. (2017) was designed to illuminate. We argue that the effective
8 functioning of the Hajj-Umrah ecosystem requires the presence and
9 empowerment of such an entity, which we designate the BSO-EHU, whose
10 organisational capabilities and boundary-spanning activities enable system-level
11 coordination and integration.

12 The organisational capabilities required of an effective BSO-EHU are
13 substantial. It needs a clear legal mandate and formal institutional authority.
14 Without these, its ability to engage credibly with powerful actors across the
15 ecosystem will be limited. It needs robust coordination systems, structures, and
16 processes capable of managing institutional diversity at scale. And it needs
17 organisational networks that span domestic and international actors alike,
18 particularly in Saudi Arabia, where so much of the pilgrimage service chain is
19 controlled. At the individual level, the boundary spanners working within the
20 BSO-EHU must combine cross-sectoral knowledge, Islamic finance, public
21 policy, and Hajj operations with the relational and communicative skills needed
22 to build trust across institutional boundaries.

23 In operational terms, the BSO-EHU's work takes five forms. Task
24 coordinator activities, arguably the most critical in this context, involve initiating
25 and sustaining cross-institutional coordination: joint task forces, shared
26 secretariat functions, and regular inter-agency forums. Service delivery activities
27 involve bridging the gap between national service standards and the realities of
28 service delivery in the Holy Cities, acting as a quality accelerator across operator
29 groups. Ambassador activities involve representing the Indonesian ecosystem to
30 Saudi authorities and other external counterparts, maintaining the bilateral
31 legitimacy and continuity on which the system depends. Scout activities involve
32 systematic monitoring of the policy, operational, and market environment for
33 emerging risks and opportunities. Guard activities involve the design and
34 deployment of risk-mitigation mechanisms to protect the ecosystem from
35 external disruptions.

36 It is important to be clear about what the BSO-EHU is not. It is not a
37 replacement for Kemenhaj's leading role in policy orchestration. Rather, it is a
38 complement, a mechanism through which the ministry's strategic direction can
39 be translated into effective cross-actor coordination at the operational level.
40 Given its financial resources, its positioning at the interface of domestic and
41 international ecosystem actors, and its statutory mandate for Hajj financial
42 development, BPKH, working through its institutional network, including
43 BPKH Limited, is the natural candidate to assume significant BSO-EHU
44 functions. Whether it can do so effectively will depend on deliberate mandate
45 design and systematic investment in the organisational capabilities the role
46 requires.

1 *An Integrated Religious Tourism Framework for the Hajj-Umrah Ecosystem*

2
3 Building on the analysis above, we propose an integrated religious tourism
4 framework for the Hajj-Umrah ecosystem organised around three mutually
5 reinforcing dimensions.

6
7 **Table 1.** *An Integrated Religious Tourism Framework for the Hajj-Umrah Ecosystem*

Framework Dimension	Focus	Governance Instruments
Pilgrim Experience Quality	End-to-end service excellence enabling <i>mabrur</i> pilgrimage.	Value co-creation; service standardisation across consumer journey.
Governance & Coordination Architecture	Multi-actor alignment and institutional integration.	Ecosystem orchestration; BSO-EHU; collaborative governance.
Domestic Value Chain Integration	Increasing inward spending and domestic value retention.	Supply chain localisation, digital interoperability, and halal industry development.

8 *Source: Authors' Analysis (2025)*

9
10 The first is the quality of the pilgrim experience. This dimension
11 encompasses the full range of service attributes that determine whether a pilgrim
12 can perform Hajj or Umrah in a manner consistent with the sacred objective of
13 *mabrur*: safety, health support, spiritual guidance, accommodation quality,
14 transportation reliability, and access to accurate and timely information. It is the
15 ecosystem's primary output, the ultimate reason for its existence. Importantly,
16 the framework treats the quality of the pilgrim experience not as a fixed outcome
17 delivered by providers to passive recipients, but as something continuously co-
18 created through interactions among all ecosystem actors throughout the
19 consumer journey.

20 The second dimension is governance and coordination architecture. This
21 encompasses the institutional mechanisms, regulatory frameworks, coordination
22 platforms, BSO functions, and collaborative governance processes that enable
23 the ecosystem's diverse actors to align their activities, share information, and
24 solve problems together, reliably delivering high-quality services. It is the
25 enabling condition for the quality of the pilgrimage experience. Without
26 effective governance, even a structurally rich ecosystem will underperform. The
27 framework identifies ecosystem orchestration (Autio & Thomas, 2021),
28 boundary-spanning (Schotter et al., 2017), and collaborative governance (Ansell
29 & Gash, 2007) as the three complementary mechanisms through which
30 alignment is achieved.

31 The third dimension is domestic value chain integration. This refers to the
32 policies, incentives, and institutional arrangements through which Indonesian
33 actors across financial, operational, and supporting industry sectors are
34 progressively positioned to supply a greater share of the services consumed by
35 Indonesian pilgrims, thereby increasing the proportion of pilgrimage-related
36 economic value that stays in Indonesia. This is both an outcome of effective
37 ecosystem governance and a strategic objective in its own right, grounded in

1 Indonesia's national interest in capturing the economic benefits of its position as
2 the world's largest pilgrimage sending country.

3 These three dimensions are mutually reinforcing in ways that matter for
4 policy. A strong governance architecture enables service integration that
5 underpins high-quality pilgrim experiences. High-quality experiences create a
6 competitive domestic market for pilgrimage services, thereby supporting value
7 chain integration. A well-developed domestic value chain reduces dependence
8 on foreign providers, strengthening the ecosystem's resilience and Indonesia's
9 negotiating leverage with Saudi Arabia. The framework thus describes a virtuous
10 cycle rather than a set of trade-offs.

11 The framework also situates the Indonesian Hajj-Umrah Ecosystem within
12 the evolving global context of pilgrimage management. Saudi Arabia's Vision
13 2030, and its Pilgrim Experience Program in particular, is transforming how Hajj
14 and Umrah are managed at the destination end, moving from a logistics-focused
15 model toward an experience-centred approach that integrates digital services,
16 improved infrastructure, and enhanced quality standards. For Indonesia, this
17 creates both opportunities and pressures. The opportunities lie in access to better
18 Saudi-side services and digital infrastructure. The pressures lie in the need to
19 develop domestic capabilities that can interface effectively with an increasingly
20 sophisticated Saudi system. The framework we propose is designed to help
21 Indonesian actors navigate this evolving context with the governance capacity it
22 demands.

23 24 25 **Conclusions, Contributions, Implications and Limitations of the Study**

26 27 *Conclusions*

28
29 This study set out to develop a conceptual and policy-oriented framework
30 for the Indonesian Hajj-Umrah Ecosystem, one grounded in ecosystem theory
31 and empirically informed by engagement with major institutional stakeholders.
32 Three principal findings emerge. *First*, the Hajj-Umrah Ecosystem could be
33 defined as the alignment structure of activities, actors, positions, and linkages
34 through which diverse stakeholders must collaborate cohesively to deliver
35 accountable pilgrimage services with service excellence in pursuit of a *mabrur*
36 pilgrimage. This definition provides a shared conceptual foundation for
37 ecosystem mapping and governance design that has been largely absent from
38 policy discussions to date. *Second*, the ecosystem comprises seven principal
39 stakeholder groups, namely regulators, pilgrims, operators, financing and
40 investment institutions, the halal supporting industry, dam management
41 institutions, and research/development/enablers, interconnected through
42 financial, information, service, and influence flows across five phases of the
43 pilgrim consumer journey. *Third*, effective ecosystem functioning requires both
44 a competent governance architecture that combines orchestration, boundary-
45 spanning, and collaborative governance and a deliberate domestic value chain
46 integration strategy.

Theoretical Contributions

This study makes several contributions to the scholarly literature. For religious tourism research, it introduces a structural ecosystem perspective that moves analysis beyond individual pilgrim experiences and provider-level service quality to examine the systemic architecture through which services are integrated and value is created across the full consumer journey. This is a meaningful methodological advance in a field that has tended toward actor-specific rather than system-level analysis. For the governance literature, it extends the BSO and ecosystem orchestration frameworks to a public-sector, religiously embedded context, demonstrating that these concepts travel productively beyond their original business-ecosystem settings. And across both fields, it advances a conception of pilgrimage ecosystem effectiveness that treats spiritual quality and economic value capture not as separate objectives but as deeply interconnected.

Practical Implications

The findings suggest several strategic priorities for policymakers and ecosystem actors. First, Kemenhaj should be systematically strengthened in its role as the ecosystem's leading orchestrator, with formal cross-institutional coordination mechanisms, joint task forces, shared secretariats, and regular multi-stakeholder forums put in place to give that role operational substance. Then, BPKH should be empowered to assume expanded BSO-EHU functions, leveraging its financial resources, international position, and institutional networks to bridge the governance gaps created by fragmentation. Next, an integrated supply chain strategy should be developed to progressively increase domestic participation in key service segments, including catering, logistics, and religious content services. Moreover, a comprehensive digital transformation roadmap is needed, with interoperability between SISKOHAT and Saudi platforms as a priority, and digital service innovation as a strategic tool to improve both the pilgrim experience and ecosystem transparency. Finally, the social and economic potential of the ecosystem should be more deliberately activated through policies supporting SME and halal industry development, linking pilgrimage economic activity to broader national development objectives.

Limitations and Future Research

Several limitations should be noted. As a conceptual study with exploratory empirical grounding, the framework developed here has not been subjected to systematic large-scale empirical testing. Future research should develop validated measurement instruments and employ methods, including survey research and social network analysis, that can test the relationships and governance mechanisms proposed. The study's empirical component also primarily draws on supply-side institutional perspectives. Thus, the pilgrims'

1 voices might be underrepresented, and future work that systematically
 2 incorporates demand-side data would enrich our understanding of how value co-
 3 creation actually unfolds in practice. Finally, as Saudi Arabia's Vision 2030
 4 continues to reshape the global pilgrimage management environment,
 5 longitudinal research will be essential for tracking how the ecosystem's structure
 6 and dynamics evolve over time and for ensuring that the frameworks developed
 7 to understand it remain analytically useful.

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