

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

By Rahmatina Awaliah Kasri^{}, Fadlul Imansyah[±],
M. Arief Mufraini[°], M. Dawud Arif Khan[•], Agung Sri Hendarsa[•] &
Risna Triandhari[°]*

Hajj and Umrah involve complex interactions among public institutions, private service providers, financial institutions, religious organisations, digital platforms, and pilgrims. For Indonesia, the scale of pilgrimage activity creates opportunities for domestic economic participation, while fragmented governance and limited integration may constrain service quality and value capture. This study conceptualises Hajj and Umrah as an integrated religious tourism service ecosystem and develops a framework for improving pilgrim experience and domestic value capture. Using a qualitative exploratory approach, the study combines a desk study, focus group discussions, and in-depth interviews with key stakeholders in the Indonesian pilgrimage ecosystem. The findings identify seven major stakeholder groups and map their activities, positions, and linkages across the pilgrim journey. The study further proposes an integrated governance architecture combining ecosystem orchestration, boundary-spanning, and collaborative governance. Three dimensions of ecosystem performance are identified: pilgrim experience quality, governance and coordination architecture, and domestic value-chain integration. The study contributes to religious tourism literature by extending analysis from individual service encounters toward system-level ecosystem integration and linking pilgrimage service quality with domestic economic value creation and capture.

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

Introduction

Every year, millions of Muslims from across the globe converge on the Holy Cities of Mecca and Medina to perform Hajj or Umrah, or engage in religious tourism more generally, as the most spiritually significant acts of worship in Islam. For Indonesia, the world's most populous Muslim-majority nation, this pilgrimage is not merely a matter of individual faith. With roughly 87 per cent of its 286 million

^{*}Lecturer, Department of Economics & Centre for Islamic Economics and Business, Faculty of Economics and Business, Universitas Indonesia, Indonesia.

[±]Hajj Financial Management Agency (BPKH), Republic of Indonesia, Indonesia.

[°]Hajj Financial Management Agency (BPKH), Republic of Indonesia, Indonesia.

[•]Hajj Financial Management Agency (BPKH), Republic of Indonesia, Indonesia.

[•]Hajj Financial Management Agency (BPKH), Republic of Indonesia, Indonesia.

[°]Lecturer, Department of Economics & Centre for Islamic Economics and Business, Faculty of Economics and Business, Universitas Indonesia, Indonesia.

citizens being Muslim (BPS 2026), Hajj and Umrah have become a defining feature of the country's social and economic landscape. In 2024, some 241,000 Indonesians performed Hajj, while annual Umrah departures have long exceeded 1.5 million (BPKH 2025), figures that place Indonesia firmly at the top of global pilgrimage statistics.

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

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

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

With these perspectives in mind, this study pursues three interrelated objectives. First, it develops an operational definition of the Hajj-Umrah ecosystem rooted in contemporary ecosystem theory. Second, it maps the actors, activities, positions, and linkages that constitute its structural architecture along the pilgrim consumer journey. Third, it identifies the governance mechanisms, particularly boundary-spanning and orchestration functions, that can strengthen coordination, service integration, and domestic value capture. The overarching argument advanced in this study is that improving the quality of the pilgrimage experience and strengthening domestic value capture are not competing objectives but are, rather, mutually reinforcing dimensions of a well-governed pilgrimage ecosystem.

The paper proceeds as follows. Section two reviews the relevant literature on religious tourism, ecosystem theory, and governance. Section three describes the

research method. Section four presents findings, including the ecosystem definition, stakeholder map, analysis of governance challenges, and an integrated policy framework. Section five concludes with a discussion of theoretical contributions, practical implications, and directions for future research.

Literature Review

Religious Tourism, Pilgrimage, and Service Quality

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

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

Recent research further demonstrates that service quality in Hajj and Umrah is closely connected with pilgrims' trust, satisfaction, and behavioural intentions. Subhan et al. (2023), for example, find that Islamic service quality and trust influence customer satisfaction and intentions to reuse Hajj and Umrah services. This suggests that pilgrimage service quality should be understood not only in terms of individual service encounters but also in relation to the broader relational outcomes experienced by pilgrim.

What remains comparatively underexplored, however, is a systemic view of how pilgrimage services are integrated, or fail to be, across the full journey. Most studies examine discrete aspects of service provision in isolation: accommodation here, transportation there, health services somewhere else. Few have asked how these components fit together as a system, where the critical failure points are, and how institutional arrangements in the sending country shape both the pilgrim's experience and the economic value that remains at home after the journey is done. This is the gap the present study directly confronts.

Ecosystem Theory: From Business to Service Ecosystems

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

Building on this foundation, Adner (2017) introduced a more precise and operationally tractable conception of what an ecosystem actually is. He distinguished between what he called "ecosystem-as-affiliation," essentially a loose community of actors gathered around a focal firm or platform, and "ecosystem-as-structure," which he defined as "the alignment structure of the multilateral set of partners that need to interact in order for a focal value proposition to materialise. This second conception is analytically more demanding but also more useful as it forces attention onto four specific structural components: activities, actors, positions, and linkages and asks how they must be configured for the ecosystem's core purpose to be realised.

Recent tourism research further supports the relevance of an ecosystem-as-structure perspective to tourism services. Gao et al. (2022) conceptualise the destination tourism service ecosystem as an interconnected system involving service concepts, service ecosystems, and service processes. Their study highlights the importance of considering both core operational systems and the wider supportive environment in which multiple actors interact to create tourism value. This perspective reinforces the relevance of examining tourism services as interconnected systems rather than as isolated service encounters.

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

Recent research on religious pilgrimage similarly emphasises the interdependence of stakeholders in shaping pilgrimage outcomes. Lin (2021), examining the Dajia

Mazu pilgrimage, finds that pilgrims, religious organisations, and host communities are among the most salient stakeholders and highlights the importance of identifying their respective contributions in pilgrimage management. This provides further empirical support for understanding pilgrimage as a multi-actor ecosystem in which outcomes depend on the contributions and interactions of different stakeholders.

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

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

Ecosystem Governance: Orchestration, Boundary-Spanning, and Collaborative Governance

Mapping an ecosystem's structure is one thing; making it function well is quite another. The governance question, how the system is steered, coordinated, and held accountable, is in many ways the harder problem, and it has attracted growing scholarly attention in recent years. Autio (2022) approached this question through the concept of ecosystem orchestration, defined as the process of coordinating autonomous yet interdependent actors toward a shared, system-level value proposition without relying on hierarchical authority. Orchestration, in their account, works through four interdependent layers: technological (shared platforms and interoperability standards), economic (incentive structures that align individual and collective interests), institutional (rules, roles, and accountability mechanisms), and behavioural (norms, trust, and the willingness to collaborate). The challenge is that all four layers must work in concert. Weakness in any one can unravel the others.

Recent work further develops the ecosystem orchestration perspective by emphasising that orchestration operates across multiple layers of an ecosystem. Autio (2022) highlights technological, economic, institutional, and behavioural dimensions of orchestration and argues that effective ecosystem coordination requires attention to the interactions among these layers. This perspective is particularly relevant to pilgrimage ecosystems, where technological interoperability, economic incentives, institutional arrangements, and collaborative behaviours need to be aligned simultaneously.

Schotter et al. (2017) contributed a related but distinct concept: the Boundary-Spanning Organization (BSO). Where orchestration focuses on system-level

coordination, boundary-spanning focuses on the actors who bridge gaps between institutions, sectors, cultures, and geographies. BSOs are entities designed specifically to connect parties that would otherwise struggle to interact effectively. They do this through five types of activity: ambassador activities (representing the system externally, maintaining its legitimacy), task coordinator activities (aligning the work of different actors), scout activities (monitoring the environment for risks and opportunities), guard activities (protecting the system from external disruption), and service delivery activities (bridging organisational standards with the actual needs of end users). In a system as institutionally diverse and geographically dispersed as the Hajj-Umrah ecosystem, the need for such bridging capacity is acute.

Recent research in the Indonesian pilgrimage tourism context also highlights the importance of institutional arrangements for enabling collaboration among stakeholders. Musleh et al. (2023) find that institutional design and an enabling environment are important conditions for collaborative governance in pilgrimage tourism in Indonesia. Their findings reinforce the need for governance arrangements that can connect actors with different institutional roles and facilitate coordinated action across organisational boundaries.

Ansell and Gash (2008) offered a third angle, focusing on the conditions under which multi-stakeholder collaboration can produce legitimate and durable governance outcomes. Their collaborative governance framework identifies several key determinants of success: the clarity and fairness of institutional design, the quality of facilitative leadership, the degree of trust among participants, and the history of prior cooperation or conflict. Applying their framework to the Hajj and Umrah context adds an important normative dimension: collaboration here is not only an institutional design challenge but a moral one, shaped by Islamic principles of *Shura* (deliberative consultation), *Amanah* (trustworthiness), and *Maslahah* (collective welfare). These values are not external constraints on governance design; they are part of what gives the system its legitimacy in the eyes of the millions who depend on it. This imperative for inclusive stakeholder participation is particularly salient in tourism-dependent communities, where local actors must be meaningfully involved in governance structures to ensure tourism development generates equitable outcomes (Thetsane 2019).

The need for coordinated governance is also evident in the management of emerging risks affecting Hajj pilgrims. Yezli et al. (2024) demonstrate that climate-related heat risks during Hajj require mitigation measures operating at individual, structural, and community levels. Their findings illustrate that resilience in pilgrimage management depends on coordinated interventions across multiple levels rather than on the actions of individual actors alone.

Conceptual Framework

The framework guiding this study brings these theoretical threads together. The Hajj-Umrah Ecosystem is conceived as a structured, multilateral system of actors, activities, positions, and linkages, grounded primarily in Adner's (2017) ecosystem-as-structure approach, with a focal value proposition rooted in the laws related to the management of Hajj and Umrah as well as the financial management, including the delivery of accountable, high-quality pilgrimage services that support Indonesian pilgrims in achieving a *mabrur* Hajj or Umrah. This framework is enriched by the value co-creation dynamics highlighted by Vargo and Lusch (2017), the digital enablement perspective of Koch et al. (2022), and the governance mechanisms of orchestration (Autio 2022), boundary-spanning (Schotter et al. 2017), and collaborative governance (Ansell & Gash 2008). Critically, domestic value capture is treated not as a peripheral economic consideration but as an integral dimension of ecosystem performance, inseparable from the quality of the pilgrimage experience itself.

Research Methods

Research Design

This study adopts a qualitative, exploratory research design, consistent with established traditions in qualitative inquiry in social research (Creswell & Creswell 2018). The choice reflects the nature of the problem at hand: conceptualising a complex, multi-actor institutional system cannot be accomplished through quantitative measurement alone. What is needed is a mode of inquiry that can capture structural relationships, institutional dynamics, and the meanings that actors assign to their roles within the system. Qualitative methods are well-suited to this task.

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

Data Collection

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

Primary data were collected through two complementary methods: focus group discussions (FGDs) and in-depth interviews conducted in between November and December 2025. Participants were selected through purposive sampling to ensure representation from all major stakeholder groups in the Hajj and Umrah ecosystem. Key informants were drawn from the following institutions: (1) the Ministry of Hajj and Umrah (MoHU); (2) the Hajj Financial Management Agency (BPKH); (3) the Sovereign Wealth Fund Institution, or well known as Danantara; (4) the National Committee for Islamic Economy and Finance (KNEKS); (5) the Indonesian Ulema Council (Majelis Ulama Indonesia/MUI); (6) registered Hajj and Umrah travel operators; and (7) academic experts in Islamic economics and pilgrimage management. FGDs facilitated the observation of inter-stakeholder dynamics and validation of the ecosystem definition and stakeholder mapping, while in-depth interviews enabled deeper exploration of individual institutional knowledge, governance challenges, and strategic priorities.

Data Analysis

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

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, the four ecosystem perspectives reviewed in Section 2 were examined against the empirical characteristics of the Indonesian pilgrimage context. 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, as 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 (2017) 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)

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

Structural Elements of the Hajj-Umrah Ecosystem

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

1. Activities and services

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

2. Actors and stakeholders

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

3. Positions

The ecosystem's architecture unfolds across five principal phases of the pilgrim consumer journey: registration and Hajj savings; the waiting period and financial management; departure preparation; pilgrimage performance through to return; and the post-pilgrimage phase. Different actor groups are engaged to varying degrees across these phases, such as operators and

financial institutions, involved throughout, and others playing more concentrated roles at specific junctures.

4. Linkages

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

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

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

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

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

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

It is important to be clear about what the BSO-EHU is not. It is not a replacement for MoHU's leading role in policy orchestration. Rather, it is a complement, a mechanism through which the ministry's strategic direction can be translated into effective cross-actor coordination at the operational level. Given its financial resources, its positioning at the interface of domestic and international ecosystem actors, and its statutory mandate for Hajj financial development, BPKH, working through its institutional network, including BPKH Limited, could potentially assume significant BSO-EHU functions. Whether BPKH should assume such functions, however, would depend on appropriate legal mandate, institutional arrangements, stakeholder acceptance, and the development of the organisational capabilities required for effective boundary spanning.

An Integrated Religious Tourism Framework for the Hajj-Umrah Ecosystem

Building on the analysis above, we propose an integrated religious tourism framework for the Hajj-Umrah ecosystem organised around three mutually reinforcing dimensions. The framework assumes that governance and coordination architecture functions as the enabling mechanism through which ecosystem actors and services are aligned, thereby supporting pilgrim experience quality and domestic value-chain integration.

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.

Source: Authors' Analysis (2025)

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

The second dimension is governance and coordination architecture. This encompasses the institutional mechanisms, regulatory frameworks, coordination platforms, BSO functions, and collaborative governance processes that enable the ecosystem's diverse actors to align their activities, share information, and solve problems together, reliably delivering high-quality services. It is the enabling condition for the quality of the pilgrimage experience. Without effective governance, even a structurally rich ecosystem will underperform. The framework identifies ecosystem orchestration (Autio 2022), boundary-spanning (Schotter et al. 2017), and collaborative governance (Ansell & Gash 2008) as the three complementary mechanisms through which alignment is achieved.

The third dimension is domestic value chain integration. This refers to the policies, incentives, and institutional arrangements through which Indonesian actors across financial, operational, and supporting industry sectors are progressively positioned to supply a greater share of the services consumed by Indonesian pilgrims, thereby increasing the proportion of pilgrimage-related economic value that stays in Indonesia. This is both an outcome of effective ecosystem governance and a strategic objective in its own right, grounded in Indonesia's national interest in capturing the economic benefits of its position as the world's largest pilgrimage sending country.

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

The framework also situates the Indonesian Hajj-Umrah Ecosystem within the evolving global context of pilgrimage management. Saudi Arabia's Vision 2030, and its Pilgrim Experience Program in particular, is transforming how Hajj and Umrah are managed at the destination end, moving from a logistics-focused model toward an experience-centred approach that integrates digital services, improved infrastructure, and enhanced quality standards. For Indonesia, this creates both opportunities and pressures. The opportunities lie in access to better Saudi-side services and digital infrastructure. The pressures lie in the need to develop domestic capabilities that can interface effectively with an increasingly sophisticated Saudi

system. The framework we propose is designed to help Indonesian actors navigate this evolving context with the governance capacity it demands.

Conclusions, Contributions, Implications and Limitations of the Study

Conclusions

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

Theoretical Contributions

This study makes three main theoretical contributions to the literature on religious tourism, ecosystem governance, and pilgrimage value creation.

First, it contributes to religious tourism literature by introducing a structural ecosystem perspective. The study moves the analysis beyond individual pilgrim experiences and provider-level service quality toward the systemic architecture through which pilgrimage services are integrated and value is created across the full pilgrim journey. By conceptualising Hajj and Umrah as an ecosystem of interdependent actors, activities, positions, and linkages, the study extends religious tourism research from an actor-specific perspective toward a system-level understanding of pilgrimage service integration.

Second, it contributes to ecosystem governance literature by extending the application of ecosystem orchestration and boundary-spanning perspectives to a public-sector and religiously embedded context. The study brings together ecosystem orchestration, boundary-spanning, and collaborative governance to explain how autonomous actors with different institutional mandates can be aligned around a shared pilgrimage value proposition. In particular, the proposed BSO-EHU extends the boundary-spanning organisation perspective to a complex pilgrimage ecosystem involving public institutions, private service providers, financial and investment

institutions, religious organisations, and actors operating across Indonesia and Saudi Arabia.

Third, it contributes to the conceptualisation of pilgrimage ecosystem performance by connecting service quality with domestic value creation and value capture. Rather than treating pilgrim experience and economic value as separate objectives, the study conceptualises them as mutually reinforcing dimensions of ecosystem performance. Effective governance and service integration can improve the quality, reliability, safety, and meaningfulness of the pilgrimage experience while simultaneously creating opportunities for greater participation and value retention among domestic actors. This provides a broader conception of pilgrimage ecosystem effectiveness that incorporates both the experiential and economic dimensions of religious tourism.

Practical Implications

The findings suggest several strategic priorities for policymakers and ecosystem actors. First, MoHU 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 could be considered as a potential institutional actor for selected BSO-EHU functions, subject to appropriate legal mandate, institutional arrangements, and stakeholder coordination, 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 Indonesia's SISKOHAT and Saudi's 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

Notwithstanding the findings above, several limitations of the study should be acknowledged. As a conceptual study with exploratory empirical grounding, the framework developed here has not yet been subjected to systematic, large-scale empirical testing. Future research should develop validated measurement instruments and employ empirical methods, including survey research and social network analysis, to test the relationships and governance mechanisms proposed. The study's empirical component also draws primarily on supply-side institutional perspectives. Consequently, the voices of pilgrims may be underrepresented, and future research that systematically incorporates demand-side data would provide a more comprehensive understanding of how value co-creation unfolds in practice. Finally, as Saudi Arabia's Vision 2030 continues to reshape the global pilgrimage management environment, longitudinal research will be essential for tracking how the structure

and dynamics of the ecosystem evolve over time and for ensuring that the frameworks developed to understand it remain analytically relevant.

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