Institutional Dynamics of Halal Tourism Development In Indonesia and Malaysia

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Abstract

In the context of Southeast Asia, Muslim-majority nations Indonesia and Malaysia had pioneered the development of halal tourism. Nevertheless, Malaysia has outperformed Indonesia in cultivating its halal tourism industry. The research sought to investigate the political economy factors contributing to this discrepancy. The research posited that the emergence of Islamic identity, the intensification of Islam's politicization, and the varying degrees of capitalizing on Islamic values are three crucial determinants influencing the relative success of Malaysia's halal tourism industry compared to Indonesia's. Firstly, the perception of Islamic identity in Malaysia is less threatening compared to that in Indonesia. Secondly, the politicization of Islam is less pronounced in Malaysia than in Indonesia. To examine these assertions, the research utilized a methodological blend of primary and secondary data, incorporating interviews with policymakers and stakeholders of halal tourism in both countries. In addition to identifying the critical factors shaping the development of halal tourism, the research contributed by offering several recommendations concerning the innovative aspect of halal tourism branding. It was argued that within the growth of halal tourism in a nation, debates surrounding the emergence of Islamic identity in aspects of halal tourism can potentially obstruct the advancement of cultural tourism commodities. Consequently, the research enhances our understanding of the complex interplay between political economy factors and the evolution of halal tourism from an academic perspective.

Introduction

Halal tourism, an intriguing concept for Muslim and non-Muslim nations alike, encompasses travel activities aligned with Islamic teachings and values (Slamet et al., 2022; Battour et al., 2018; Carboni et al., 2014; Oktadiana et al., 2016) and is often considered a subset of religious tourism (El-Gohary, 2016). The term "halal", denoting permissibility in Islamic teachings, forms the foundation of this understanding. Muslims, encouraged to travel for both pilgrimage and leisure purposes, require accommodations, food, fashion, and medical care that comply with Islamic principles (Battour et al., 2018). Despite its potential, halal tourism remains a relatively nascent phenomenon requiring further elucidation due to the potential economic, political, societal, and cultural implications arising from variations in Islamic norms and religious beliefs (Rasul, 2019). Nevertheless, the halal tourism sector is anticipated to experience significant growth, as demonstrated by its increasing popularity in Muslim-majority and non-Muslim countries such as Japan, China, South Korea, and Thailand (Yousaf & Xiucheng, 2018). Governments have acknowledged this trend and are actively endorsing it as a branding strategy to bolster their economies (Battour et al., 2018).

Malaysia and Indonesia have emerged as pioneers in halal tourism development in Southeast Asia, attributable to several factors. Firstly, both countries boast sizable Muslim populations, facilitating the promotion and expansion of halal tourism. Secondly, the Malaysian and Indonesian governments have recognized halal tourism's economic potential, implementing policies and initiatives to support its growth. For instance, Malaysia established the Malaysia Tourism Promotion Board in 1991, which has been instrumental in fostering the halal tourism industry (Samori, Salleh, & Khalid, 2016). Similarly, Indonesia introduced the "Wonderful Indonesia" campaign in 2011 to promote its tourism industry, encompassing halal tourism (Slamet et al., 2022).

As popular tourist destinations, these predominantly Muslim nations have witnessed significant economic growth due in part to halal tourism. Since 2001, Malaysia has consistently attracted tourists, courtesy of its supportive Islamic environment, and has emerged as a model for other countries seeking to develop halal tourism. Conversely, Indonesia has recently initiated its halal tourism program as a strategic maneuver to stimulate local economic activity and entice more visitors.

Nonetheless, challenges persist in promoting halal tourism, particularly in Indonesia, where its application in certain regions is deemed inappropriate due to ethnic and religious differences (Slamet et al., 2022). Additionally, the term "halal tourism" may incite discrimination, prompting the suggestion of "Muslim-friendly tourism" as an alternative. Despite these challenges, halal tourism represents a burgeoning trend warranting further investigation, especially concerning its development across various countries.

Institutional Dynamics

This research endeavors to explore state-society relations' role in shaping halal tourism development in Indonesia and Malaysia, as well as the extent to which Islamic identity influences the success of these initiatives. The research aims to offer valuable insights and recommendations for countries aspiring to utilize halal tourism as a branding strategy and attract more international tourists. By scrutinizing differences in the politicization of Islam and the capitalization of Islamic values, this research seeks to illuminate the critical factors contributing to Malaysia's thriving halal tourism industry and the obstacles Indonesia encounters in implementing its program. Ultimately, this investigation can serve as an invaluable resource for policymakers and marketers endeavoring to enhance their halal tourism strategies and capitalize on this expanding trend.

The research posits that several factors are instrumental in explaining Malaysia's superior success compared to Indonesia in the halal tourism sector. Specifically, the emergence of Islamic identity, the politicization of Islam, and the degree of capitalization of Islamic values are argued to be crucial in this context. Malaysia is suggested to exhibit lower levels of Islam's politicization compared to Indonesia, and non-Muslim majority countries tend to perceive halal tourism as part of the state's responsibility in improving the political economy. By comprehending these factors, governments and countries marketing halal tourism can derive valuable insights and recommendations that can help augment the influx of international tourists.

The remainder of the research is organized as to: 1) provide a literature review on halal tourism, its potential growth, and the challenges it faces; 2) outline the research methodology employed, which includes the use of primary and secondary data, as well as interviews with policymakers and stakeholders in the halal tourism industry in both Indonesia and Malaysia; 3) present the findings of the study, which highlights the crucial factors contributing to the development of halal tourism in these countries and the implications of Islamic identity on their success; 4) discuss the results in the context of the broader literature and offers recommendations for policymakers and marketers aiming to capitalize on the growing trend of halal tourism; and 5) conclude the article by summarizing the main findings and discussing the potential avenues for future research in this domain.

Through this comprehensive examination of the halal tourism industry in Indonesia and Malaysia, the research aims to contribute to the scholarly understanding of the interplay between political economy factors, Islamic identity, and the development of halal tourism. By providing practical recommendations for nations looking to promote halal tourism as part of their branding strategy, this research seeks to foster the sustainable growth of this burgeoning sector, ensuring that it remains an inclusive and accessible avenue for tourists from diverse backgrounds.

Literature Review

The nexus between halal tourism and Islamic identity has piqued the interest of scholars in recent years. As a vital social institution, religion significantly influences individuals' and

society's attitudes, values, and behavior, leading to an evident connection between religion and tourism, particularly in the context of halal tourism (El-Gohary, 2016). Though a relatively nascent concept, halal tourism has been the subject of extensive debate among researchers. Nonetheless, existing literature has established that it encompasses the provision of products and services catering to Muslim tourists' travel needs while adhering to Islamic teachings and values (Mohsin et al., 2016).

Derived from Arabic, the term "halal" denotes permissible actions according to Islamic teachings, whereas "haram" refers to proscribed actions. Within Islamic teachings, halal represents moral behavior encompassing all aspects of life, such as clothing, language, food, and drink (Vargas-Sánchez & Moral-Moral, 2018). Consequently, halal tourism entails the delivery of travel products and services aligned with Islamic principles and values, necessitating adherence to Islamic teachings and customs during development and marketing processes (Battour et al., 2018). As adherents of Islam, Muslims are encouraged to travel in accordance with religious teachings, extending beyond Hajj or Umrah to encompass recreation, socialization, and appreciation for all of God's creation (Oktadiana et al., 2016). Hence, halal tourism plays a crucial role in reinforcing Islamic identity and values among Muslim travelers.

Several studies have explored the dimensions of halal tourism and its implications for destination marketing and management (Henderson, 2016; Samori et al., 2016). These studies have identified various challenges and opportunities for the growth of the halal tourism industry, such as the need for standardized certification processes, accommodation and food services that cater to Muslim tourists, and the importance of cultural sensitivity in marketing strategies (Battour & Ismail, 2016; Jafari & Scott, 2014). Furthermore, research has underscored the importance of understanding the diverse preferences and expectations of Muslim tourists, who represent a heterogeneous market segment with distinct cultural, ethnic, and national backgrounds (El-Gohary, 2016; Oktadiana et al., 2020).

In summary, the literature review indicates a robust relationship between halal tourism and Islamic identity. Grounded in Islamic principles and values, halal tourism constitutes a vital component of the tourism industry for Muslim travelers. It reinforces Islamic identity and values among Muslim tourists, offering them opportunities to partake in travel activities compatible with their religious teachings. This growing body of research underlines the need for further investigation into the development of halal tourism in various contexts, as well as the factors that contribute to its success or failure in different countries.

Islam and politicization

The development of halal tourism faces various challenges, as noted in the literature. One of the primary management challenges is related to the lack of standardization and certification in the halal tourism industry. Due to the absence of a universal halal certification and accreditation system, different interpretations of what constitutes halal exist, leading to confusion and distrust among Muslim tourists. Another management challenge is the limited

availability of halal tourism products and services, which results in a lack of market diversity and ultimately reduces the appeal of halal tourism.

In addition to the challenges, another critical management challenge in developing halal tourism is human resource management. The success of halal tourism heavily relies on the quality of services provided to Muslim travelers, which, in turn, depends on the quality of human resources available in the tourism industry.

A key debate in the literature surrounding human resource management in the context of halal tourism is whether a specific set of skills or knowledge related to Islamic practices and culture is necessary. Some argue that specialized training and knowledge are required to cater to Muslim travelers' specific needs, such as halal food preparation, prayer facilities, and appropriate dress codes. Others, however, argue that the fundamental principles of good customer service and hospitality are universal and should be the main focus of human resource management in the halal tourism industry.

Another issue related to human resource management in halal tourism is the availability of qualified staff, particularly in Muslim-minority countries. In countries where Muslims are a minority, it may be challenging to find staff with the necessary knowledge and skills to cater to Muslim travelers' needs. This can be particularly difficult in areas such as food preparation, where there may be a lack of understanding of halal certification and the specific requirements of halal food production.

Moreover, language skills can also pose a challenge for the tourism industry in catering to Muslim travelers. As the majority of Muslim travelers are non-native English speakers, staff proficient in other languages, such as Arabic or Urdu, may be necessary to communicate effectively with these tourists.

Addressing these challenges in human resource management in the halal tourism industry requires a proactive approach to recruitment, training, and staff development. Employers need to invest in staff training to ensure employees possess the necessary skills and knowledge to provide high-quality services to Muslim travelers. Additionally, recruitment efforts should target individuals with the required language and cultural skills. Finally, promoting diversity and inclusivity in the tourism industry will help attract and retain qualified staff from diverse backgrounds.

Economic challenges in developing halal tourism are also significant. Firstly, the high cost of halal certification for businesses and service providers is a substantial barrier to entry, especially for small and medium-sized enterprises (SMEs). Secondly, the lack of investment in infrastructure and technology needed to cater to Muslim tourists' specific needs, such as halal food and prayer facilities, may reduce the attractiveness of halal tourism destinations. Thirdly, halal tourism development requires considerable investment in research and development, product design, and marketing, which may not be feasible for some destinations.

Marketing is a significant challenge in developing halal tourism, as it requires targeting a specific niche market with unique needs and preferences. The promotion and marketing of

halal tourism must focus on ensuring that the target audience is aware of the provided facilities and services, and that the destination can meet their requirements.

One of the main challenges in marketing halal tourism is the lack of standardization and regulation of halal tourism products and services. This leads to difficulties in promoting and marketing halal tourism products and services, as it is challenging to determine whether a particular product or service is halal or not. This challenge could potentially lead to a loss of trust and confidence in halal tourism products and services, negatively impacting the industry.

Another challenge in marketing halal tourism is the competition between halal tourism destinations. With the increasing demand for halal tourism, many destinations are entering the market, creating fierce competition. Destinations must differentiate themselves and create a unique selling proposition to attract halal tourists.

Additionally, the lack of marketing expertise and funding for promoting halal tourism is a significant challenge. Many countries have not yet developed the necessary marketing strategies and campaigns to effectively promote their halal tourism products and services. Furthermore, due to limited resources and funding, many countries are unable to compete with other destinations in terms of marketing efforts.

These factors might indeed provide an insightful explanation of the challenges in developing halal tourism. The research focuses on how the politicization of Islam by the state has influenced the development of Halal Tourism. Many Muslim-majority countries have recognized the potential of Halal Tourism and have actively promoted it as a means of economic development. However, the state's politicization of Islam can significantly impact the development of Halal Tourism. In many Muslim-majority countries, the state plays a crucial role in regulating and promoting Halal Tourism. For example, in Malaysia, the government has established a Halal Tourism Unit to oversee the development and promotion of Halal Tourism (Arshad et al., 2019). Similarly, in Indonesia, the government has created a Halal Tourism Development Acceleration Team to support the growth of this sector (Santoso et al., 2022). These government initiatives reflect the increasing politicization of Islam in these countries, where the promotion of Halal Tourism is seen as a way to showcase their Islamic identity and strengthen their position in the global Muslim community.

Furthermore, in many Muslim-majority countries, the government has used Islam as a political tool to gain legitimacy and support from the population. As a result, they have promoted the development of Halal Tourism as a way of attracting Muslim tourists and promoting themselves as Islamic states. In some cases, the state has used Halal Tourism as a way to promote a particular political agenda. For example, in Malaysia, the government has promoted Halal Tourism as a means of promoting a conservative Islamic identity and countering the influence of Western culture. This politicization of Islam can create tensions within the tourism industry and may limit the potential growth of Halal Tourism.

Furthermore, the state's role in regulating Halal Tourism can also affect its development. In some cases, the state may impose strict regulations on Halal Tourism to maintain a certain

level of religious authenticity. This can create challenges for businesses in the tourism industry, particularly those that are not based in Muslim-majority countries (El-Gohary, 2016). However, there are also examples of states that have successfully promoted Halal Tourism without politicizing Islam or imposing overly restrictive regulations. For example, in Turkey, the government has promoted Halal Tourism to attract Muslim tourists without promoting a specific political agenda (Elaziz & Kurt, 2017). This approach has allowed for the development of a thriving Halal Tourism industry in Turkey.

The politicization of Islam can also have negative impacts on the development of Halal Tourism. Halal tourism can be used as an agenda for political Islam because it provides a platform for promoting Islamic values and practices in the tourism industry. As halal tourism is focused on providing services and facilities that comply with Islamic principles, it can be used as a means to promote a particular version of Islam that political Islamists favor. For example, in some countries, the strict interpretation of Islamic laws can limit the development of certain types of tourism activities, such as entertainment and nightlife, which may not be considered Halal. This can limit the diversity of tourism products and experiences available to Muslim travelers, potentially hindering the Halal Tourism sector.

In countries where political Islam is dominant, halal tourism can be used to promote Islamic values and practices to reinforce the Islamic identity of society. This can lead to an increase in the use of Islamic dress codes, segregation of genders, and the promotion of Islamic teachings in public spaces. It can also lead to the adoption of Shariah laws in the tourism industry, which can impact the behavior and practices of tourists who visit these countries. Furthermore, halal tourism can be used to support the development of the local Islamic economy and to promote the interests of Islamic business owners, which can further reinforce the Islamic identity of the society. This can also lead to the marginalization of non-Muslims and the exclusion of other cultural and religious groups from the tourism industry.

Overall, the relationship between the state and the politicization of Islam can have a significant impact on the development of Halal Tourism. States that are able to promote Halal Tourism without politicizing Islam or imposing overly restrictive regulations are likely to experience the most success in this area. In conclusion, the state and politicization of Islam have played a significant role in the development of Halal Tourism. While government initiatives have helped to promote this sector and increase its economic and social benefits, the strict interpretation of Islamic laws in some countries may limit its growth potential. As the global Muslim population continues to grow, the development of Halal Tourism is likely to remain an important area of focus for governments and tourism stakeholders around the world.

In order to foster the growth of Halal Tourism, it is essential for governments and industry stakeholders to recognize the potential pitfalls of politicizing Islam and implement strategies to promote inclusivity and diversity in the sector. This may involve creating clear and consistent guidelines for halal tourism providers, promoting cultural exchange and understanding, and ensuring that the needs of all tourists, regardless of their religious beliefs, are taken into consideration. By addressing these challenges and embracing the opportunities

presented by the growing demand for halal tourism, the industry has the potential to thrive and contribute significantly to the global tourism landscape.

Methodology

The research aims to examine how the politicization of Islam may hinder the development of halal tourism. In achieving the goal, the research compares the trajectories of halal tourism development in Indonesia and Malaysia, both predominantly Muslim countries and popular halal tourism destinations. Despite sharing many similarities, including the initiation of policies and activities to boost their economies and create jobs through halal tourism, the two countries exhibit differences in the reception of the concept. Specifically, halal tourism faces resistance in certain regions of Indonesia, while such opposition is absent in Malaysia. By comparing these divergent paths, the research seeks to shed light on the ways in which the politicization of Islam can impede the development of halal tourism.

This research employs a qualitative comparative case study design, focusing on Indonesia and Malaysia. This approach enables a deeper understanding of the complex interplay between the politicization of Islam and the development of halal tourism in both countries. Primary data is gathered through semi-structured interviews with relevant stakeholders in Indonesia and Malaysia. In Indonesia, we will interview informants from the Ministry of Tourism, as well as tourism stakeholders in Jakarta, Lombok, and West Sumatera. In Malaysia, interview is implemented with policymakers from the Ministry of Tourism, particularly those involved in Islamic tourism, as well as representatives from tourism business associations and academics.

The semi-structured interview format allows for flexibility in exploring the perceptions and experiences of the interviewees, while also maintaining a focus on key themes and topics. Interviews conducted either in-person and via online platforms. In addition to the primary data, the research utilizes secondary data sources to enrich our understanding of the research topic. These sources include research articles, books, policy documents, and reports related to halal tourism and the politicization of Islam in Indonesia and Malaysia.

The data collected from the interviews are transcribed and analyzed using a thematic analysis approach. This method involves identifying, analyzing, and reporting patterns or themes within the data. The process of coding and categorizing the interview transcripts identifies key themes and sub-themes related to the politicization of Islam and its impact on the development of halal tourism in both countries.

The analysis is conducted in an iterative manner, allowing for constant comparison and refinement of emerging themes. To ensure the trustworthiness of our findings, the research employs strategies such as triangulation of data sources and member checking, where possible. This qualitative comparative case study seeks to provide valuable insights into the ways in which the politicization of Islam can impede the development of halal tourism in Indonesia and Malaysia. By examining the experiences and perspectives of stakeholders in

both countries, the research aims to contribute to the broader understanding of the challenges and opportunities in the halal tourism sector, and inform future policy and practice.

Analysis

Halal Tourism in Indonesia and Malaysia

The tourism sector is the most important sector in the growth of the Gross Domestic Product (GDP). Therefore, it can be said that tourism has a significant role in contributing to economic growth in many countries. The expansion of the tourism sector, which became halal tourism, turned out to be the most popular in the market. Hence, it is estimated that the development of the sharia tourism market segment will have the potential to continue growing in the future (Keliat & Sentanu, 2022). Judging from the high interest in halal tourism in Indonesia and Malaysia, there is data to show that tourism revenues in Indonesia averaged US$2334.90 million from 2010 until 2022, reaching an all-time high of US$4722.71 million in the third quarter of 2019 and a record low of US$76.94 million in the third quarter of 2021 (trading economics, 2023). In contrast, tourism revenues in Malaysia averaged RM45242.76 million from 1998 until 2021, reaching an all-time high of RM86143.50 million in 2019 and a record low of RM238.73 million in 2021 (Trading Economics, 2023).

Based on the 2017 Global Muslim Travel Index, the Muslim tourist travel market is declared a segment of the global travel industry that has very fast growth (Slamet et al., 2022). With the rapid growth in the tourism industry, it is also estimated that the Muslim population will be in the figure of 26% of the total population in the world by 2020. Looking at Indonesia and Malaysia as pioneer countries for Muslim tourist destinations and as the most visited countries, based on the 2022 Global Muslim Travel Index data, it is a fact that 2019 saw the highest record in global Muslim tourist arrivals, with 160 million visiting Indonesia.

Since the COVID-19 pandemic in 2020, the number of Muslim tourist visits has decreased, but it is estimated that the number of tourists visiting Indonesia will reach 140 million in 2023 and return to 160 million in 2024. It is estimated that after the COVID-19 pandemic, the number of global Muslim tourists will continue to grow rapidly and reach 230 million in 2026 with expenditures of around US$225 billion.

The Malaysian government has also taken aggressive steps by targeting around 900 million Muslim tourists to be able to visit Malaysia after the COVID-19 pandemic. Based on the results of an interview with the Minister of Tourism, Arts, and Culture, Datuk Seri Nancy Shukri, the halal tourism industry had contributed to the economic sector as much as RM16.72 billion in the era before the COVID-19 pandemic hit all corners of the world, with 5.3 million donations from the arrival of foreign tourists.

Malaysia is expected to become a country that can meet the needs of Muslim tourists and there is no need to doubt its halal status, as the Malaysian government has taken a bold and proactive step by targeting around 900 million Muslim tourists visiting Malaysia.

Indonesia and Malaysia have successfully entered the GMTI (Global Muslim Travel Index) ranking, which has named them Muslim-friendly tourism destinations in the world.

Malaysia is known as the world's best halal tourism destination, based on the 2015 Global Muslim Travel Index (GMTI) Rating. Being a Muslim-majority country, it is recognized as a Muslim-friendly country that is comparable to Middle Eastern countries famous for their Muslim facilities. Additionally, Malaysia consistently instills Islamic culture as a norm for the state.

Following the 9/11 incident, Malaysia has witnessed a surge in tourism visits as it has become a popular destination for Muslim tourists (Samori et al., 2016). Due to the strict regulations for Muslim tourists visiting Western countries, many of them have shifted their focus to Asian countries where the majority of the population is Muslim. Malaysia has shown a remarkable growth rate in its Muslim tourism market since 2001, which has been consistent over time. The government's proactive approach towards promoting tourism has contributed to maintaining the number of tourist visits and has attracted Muslim tourists, particularly from the Middle East. The number of tourists from the Middle East has created a profitable market niche for Malaysia. In light of this, Malaysia has been able to capitalize on the surge in tourism visits and maintain its position as a popular destination for Muslim tourists.

Malaysia is the most popular travel destination for Middle Eastern countries and other countries such as Turkey, owing to adequate travel facilities, prayer facilities, and halal food. The local government sustains socioeconomic status and cultural heritage to reflect that Malaysia is the world's most popular Muslim tourist destination (Samori et al., 2016).

The Malaysian government has developed strategies to satisfy the primary tourist market from the Middle East. For instance, Middle Eastern tourists can easily find typical Middle Eastern food while in Malaysia. There is no need to worry about language limitations, as the government encourages all tourism sectors and hotels to provide staff who can speak Arabic.

Halal tourism in Indonesia is a developing industry that has been gaining attention in recent years. Indonesia, as the world's largest Muslim-majority country, has the potential to be a leader in the halal tourism industry. However, there have been challenges and controversies surrounding the development of halal tourism in the country.

There is a growing market for halal tourism, with an increasing number of Muslim travelers seeking destinations that cater to their religious and cultural needs. This has led to a push for the development of halal tourism in Indonesia, with efforts to provide halal-certified food options, prayer facilities, and other amenities that cater to Muslim travelers. The Indonesian government has recognized the potential of halal tourism and has set a target to attract 5 million halal tourists by 2019.

Muslim travelers see Indonesia as an attractive destination due to its large Muslim population and the availability of halal tourism facilities and services. Indonesia is the world's largest Muslim-majority country, with a population of over 270 million people, the vast majority of whom are Muslims. As a result, Indonesia is viewed as a natural destination for

Muslim travelers seeking halal-certified food, prayer facilities, and other services that cater to their religious needs.

In addition to the availability of halal tourism facilities, Indonesia is a home to numerous cultural and natural attractions that are of interest to Muslim travelers. These include historic mosques and Islamic landmarks, beautiful beaches, and stunning natural landscapes. Jakarta, the capital city of Indonesia, has a vibrant Muslim culture and is home to many mosques, halal restaurants, and other Islamic attractions.

In Indonesia, Jakarta is a popular tourist destination that attracts both domestic and international visitors, including those from the Middle East, ASEAN, Asia, and Europe. As reported in an interview on the Jakarta Moslem Friendly Tourism Exhibition (JMFTE) in 2022, Muslim-friendly tourism is a key focus for Indonesia and is expected to be promoted every year through events such as the JMFTE. As the capital city, Jakarta serves as a gateway for foreign tourists to Indonesia, which is one of the largest Muslim countries in the world and a leading destination for Muslim-friendly tourism.

To further promote the development of Muslim-friendly tourism, the Indonesian government is implementing various projects to attract Muslim visitors to the country. One of the main efforts is to develop halal tourism destinations across different regions in Indonesia, including DKI Jakarta, West Sumatra, Aceh, West Nusa Tenggara, West Java, Central Java, East Java, Yogyakarta, Riau, and South Sulawesi. For instance, West Sumatra has received recognition as the best halal tourism destination since 2016, while Aceh and NTB have been designated as Muslim-friendly tourist destinations due to their strong Islamic religious background. In fact, NTB is the first province in Indonesia to establish a Halal Tourism Regulation, as reported by Adinugraha et al. (2021). These efforts aim to expand the market niche of halal tourism in Indonesia and cater to the specific needs and preferences of Muslim tourists.

The discussion highlights the emergence of the global market conditions in the tourism industry, particularly in the halal tourism segment, which has become a robust trade arena, presenting numerous opportunities for companies that can take advantage of the halal-certified product market. Countries in the Asian region, such as Singapore, Thailand, the Philippines, South Korea, and Japan, are aware of the benefits of the development of halal products and have shown interest in the halal industrial market. However, despite the intention to build a halal industrial market in Muslim minority countries, finding a restaurant with halal certification is still challenging in these countries, making it difficult for Muslim tourists to find places to eat that guarantee the food is in accordance with Islamic teachings. Therefore, ensuring that Muslim tourists feel protected and safe is a crucial consideration for both non-Muslim and Muslim countries.

Halal certification is one of the most critical factors in halal tourism resources, as it is the main key to attracting tourists to visit. Authentic Halal certification is usually provided by a government-controlled agency or an Islamic organization that can test and certify that the product offered is legal for consumption by Muslims. The halal logo on products being sold can increase their selling power, as it provides a guarantee to Muslims and fosters a positive

relationship between Muslim tourists and the local state that cares about the needs of Muslim tourists.

The most authoritative institution in providing Halal certification in Indonesia is the Food, Drug, and Cosmetics Institute of the Indonesian Ulema Council (LPPOM MUI), which was established in 1989 to assist the Indonesian Ulema Council (MUI) in the Islamic sphere and has become the main institution in Halal certification services in Indonesia. This institution regulates everything related to halal certification and has the authority to grant Halal certification to products and services. Additionally, this institution provides guidelines and consulting services for companies and organizations that will provide Muslim-friendly services, further promoting halal tourism in Indonesia.

In addition to Indonesia, Malaysia is also a leading country in halal certification for products and services. The Malaysian Islamic Department (JAKIM) is the highest authority in Malaysia to provide halal certification for products and services, including tourism products and services. The halal certification standard used in Malaysia is the MS 1500:2004, which is based on Islamic teachings and guidelines. JAKIM plays a crucial role in ensuring the quality of halal certification in Malaysia, which is an important factor in attracting Muslim tourists. With the growing demand for halal tourism, it is essential for countries to establish credible and authoritative institutions like JAKIM and LPPOM MUI in Indonesia to provide halal certification for products and services. This can not only attract Muslim tourists but also promote trust and confidence among the local Muslim communities and the broader halal industry.

The concept of halal tourism, which was initially a concern for Muslims, has now gained global attention, particularly in the business and industrial sectors. Indonesia and Malaysia, both Muslim-majority countries, have recognized this tourism industry as an opportunity to increase the number of tourists. Jakarta, a highly sought-after tourist destination, attracts not only domestic tourists but also visitors from the Middle East, ASEAN, Asia, and Europe. Muslim-friendly tourism is one of Indonesia's mainstays and is expected to occur yearly, as highlighted in the 2022 Jakarta Moslem Friendly Tourism Exhibition (JMFTE) interview. Jakarta is promoting Muslim-friendly tourism through the Jakarta Moslem Friendly Tourism Exhibition 2022, positioning itself as a market and a leading destination for Muslim-friendly tourism. Being the capital city of Indonesia, Jakarta serves as the gateway for foreign tourists to enter Indonesia.

Malaysia has positioned itself as a top Islamic tourist destination by offering products and services that align with Islamic values (Samori et al., 2016). In 2010, the country established Halal certification standards for its product supply, including luxury and roadside restaurants. Furthermore, the Malaysian government continues to develop its facilities to provide an exceptional tourist experience. Besides promoting halal certification, the government is constructing Muslim-friendly hotels and prayer facilities in all shopping centers.

Indonesia has the potential to follow in Malaysia's footsteps in promoting Halal tourism and becoming a Muslim-friendly destination. The Chairman of the Indonesian Halal Tourism

Association (PPHI), Riyanto Sofyan, suggests that DKI Jakarta, as the capital city of Indonesia, can be maximized as a gateway for foreign tourists to enter Indonesia. Therefore, it is necessary to promote Jakarta as a Muslim-friendly tourist destination. It should be noted that the concept of Muslim-friendly tourism, formerly known as Halal tourism, provides additional services and facilities for Muslim tourists. However, it is essential to clarify that halal, sharia, or Muslim-friendly tourism is not religious tourism. It is a travel concept that aims to cater to the needs of Muslim tourists, including halal food, prayer facilities, and other cultural and religious considerations. Therefore, the promotion of Jakarta as a Muslim-friendly destination is crucial in attracting Muslim tourists and enhancing Indonesia's tourism industry.

Despite the potential for halal tourism in Indonesia, the concept is facing challenges that are not related to government regulations, unlike in Malaysia. The main challenge in Indonesia is the rejection of the halal tourism concept, which may be driven by the complex state-society relations in the country. In contrast, Malaysia has not faced similar issues with the concept of halal tourism. The next section of this research examines the difference in state-society relations between Indonesia and Malaysia, which has led to different paths in the development of halal tourism.

Differences in Institutional and State-Society Aspects

The emergence of halal tourism has brought attention to the rise of political Islam, which positions itself as an awareness that Muslims must maintain teachings that are in accordance with Islamic values. This trend has gained global attention due to the economic benefits it provides. In Indonesia, there are Sharia Regional Regulations based on Islamic law, which some consider a threat to the diversity and values of Pancasila. The post-reform era has seen the passing of regional regulations with religious overtones at both the provincial and district/city levels.

Religion is a social institution that influences individuals' attitudes, values, and behavior. Previous studies viewed Halal Tourism as a novelty, but El-Gohary (2016) views it as an old concept rooted in Islamic Sharia. While Western countries generally separate religious beliefs from political and legal systems, this cannot be universally applied to countries where the majority of the population is Muslim and where Islamic law is a way of life. Muslims who believe in the teachings of God or Sharia are affected by political Islam.

Halal tourism has a profound impact on the tourism industry, particularly in countries where Islam is the majority religion. This trend has led to the promotion of Sharia Regional Regulations and the rise of political Islam. While some view this as a threat to diversity and values, others view it as a way to maintain Islamic values and teachings. Regardless, the impact of religion on society cannot be overlooked, and its influence on attitudes and behavior must be taken into account.

When it comes to state-society aspects, the approaches to Islam in Malaysia and Indonesia differ significantly. Malaysia tends to take a more conservative approach towards Islam. Its Islamic authorities have imposed restrictions on certain aspects of Islamic practices and beliefs, including the banning of Shia Islam and the promotion of a specific interpretation of Sunni Islam. Moreover, Malaysia's approach to religious freedom is more restrictive, with laws that prohibit the propagation of non-Islamic religions to Muslims.

On the other hand, Indonesia, while being a majority Muslim country, has a secular constitution and does not have Islam as its official religion. The Indonesian government has established the Ministry of Religious Affairs to oversee religious affairs, including the management of hajj pilgrimage and religious education. Indonesia has a unitary system of government, and each province has its own religious council to regulate religious affairs at the local level.

Indonesia has a more diverse and pluralistic approach to Islam compared to Malaysia. The country has a long history of syncretism, which is the blending of Islamic, Hindu, and animist beliefs and practices. The government in Indonesia also promotes a moderate form of Islam known as "Islam Nusantara," which emphasizes tolerance, diversity, and national unity. Additionally, Indonesia has a more liberal approach to religious freedom, with laws that guarantee the right to freedom of religion and prohibit discrimination based on religion.

In contrast to Indonesia's more diverse and pluralistic approach to Islam, Malaysia has a more conservative approach, with restrictions imposed on certain Islamic practices and beliefs. Nevertheless, both countries have undergone significant changes in the role of Islam within politics and society in recent decades. A prime illustration of this evolution is the emergence of Malay nationalism, which was inherently linked to Islam. The Malay nationalist movement emerged as a direct response to the call for liberation from colonial powers, becoming a visible presence in the early 20th century. This drive for liberation was steered by influential forces in mainstream media and literature. Notably, these platforms propagated political ideologies intertwined with Islamic consciousness among the Malay population, further solidifying the connection between the faith and the nationalist sentiment. During the early 1900s, a surge of educated Malay elites began establishing organizations centered on literature, education, and welfare. Their mission was not only to inspire transformative changes within Malayan society but also to cement the role of Islam in these transformations (Jamil & Abdullah, 2022).

In Indonesia, the democratization process that began in 1998 has given rise to political Islam, which was heavily suppressed under the authoritarian regime of President Suharto. The increasing democratization of the country has allowed Islamic organizations and leaders to express their views and mobilize support, while the role of Islamic civil society organizations has become more prominent in shaping public discourse.

Decentralization of power to regional governments has also allowed local Islamic leaders and organizations to gain greater influence over public policy and decision-making. In some regions, Islamic political parties have been able to gain control of local governments and promote Islamic values.

On the other hand, the increasing influence of conservative Islamic groups, such as Salafis and Wahhabis, has also contributed to the rise of political Islam in Indonesia. These groups promote a strict interpretation of Islamic law and reject pluralism and secularism, and have gained a foothold in Indonesia through the spread of Islamic education and media influence.

While Malaysia and Indonesia have different approaches to Islam, both countries have experienced changes in the role of Islam in politics and society. The rise of political Islam in Indonesia has been influenced by factors such as democratization, the role of Islamic civil society organizations, decentralization of power, and the influence of conservative Islamic groups.

The Politicization of Islam in Indonesia

Since democratization, the political Islam has also dominated the Indonesian politics. Such domination is increasingly evident at the sub national level. In some regions, Islamic political parties have been able to gain control of local governments, allowing them to implement policies that promote Islamic values. This has been particularly evident in regions with a significant Muslim population, where Islamic political parties have been able to mobilize support and win elections. Example of the domination of political Islam at the sub-national level in Indonesia is the province of Aceh. Aceh has a long history of Islamic influence and was granted special autonomy in 2001, allowing it to implement sharia law in the region. The local government has established a religious police force to enforce Islamic law, including dress codes and the prohibition of alcohol and gambling. The provincial government has also implemented policies that promote Islamic values, such as requiring Muslim civil servants to attend Friday prayers and providing financial assistance for Islamic education. As a result many scholars argue that Indonesian democracy has been in decline (Metera, 2022)

The politicization is happening in many aspect of life dubbed as what scholars have termed as conservative turn. The concept of the 'conservative turn,' as it has been studied by scholars, refers to the increasing permeation of religious influence in various aspects of contemporary life. It's a phenomenon prominently seen in Indonesia where Islam's influence has significantly grown in social, political, and cultural spheres (Saefullah, 2022). For the central government, the issue of regional regulations might hinder economic growth and not aligning with central government regulations. This has prompted President Jokowi to seek their abolishment. However, this policy is limited due to the fact that many community groups use sharia regional regulations during general elections, especially in their campaigns for the presidency. Despite efforts to reduce them, local sharia regulations in Indonesia have actually increased during President Joko Widodo's second term, and it is predicted that more will be adopted in the future. In fact, over 70% of regions in Indonesia have issued regional regulations with religious nuances, including Islamic sharia and the Bible.

The increase in sharia regulations has raised concerns among researchers at the LIPI Research Center, who view their creation as potentially discriminatory and elitist in nature.

They warn that intolerant groups may use these regulations to disrupt minorities or consolidate networks of intolerant groups. Furthermore, the use of sharia regulations in politics can be seen as a sign of political corruption since politicians may use their power to control religion. The politicization of religion in Indonesia has also had an impact on how halal tourism is viewed, often sparking political debate rather than being discussed as an economic opportunity.

The politicization of religion in Indonesia, as seen in the rise of political Islam and the proliferation of sharia regulations, has affected the development of halal tourism in the country. In contrast, Malaysia has successfully integrated Islam into its social contract, and the government and existing associations work together to support the promotion of halal tourism. The difference in approach is reflected in the number of associations involved in the development of the halal tourism model in Indonesia, making it more political and hindering its progress. In Muslim minority countries such as Japan, South Korea, and Thailand, halal tourism is seen as a profitable opportunity for the economy, whereas in Indonesia, despite being a Muslim-majority country, the country still deals with rejection due to the politicization of religion. This highlights how the politicization of religion can impact economic development and create barriers to progress.

In Indonesia, the rejection of halal tourism has been observed in various tourist destinations, including Bali, Danau Toba in North Sumatra, Tana Toraja in South Sulawesi, and Labuan Bajo in West Nusa Tenggara. Interestingly, the rejection of halal tourism is more pronounced in areas where Muslims are a minority, indicating that identity politics may play a role in the opposition to the concept of halal tourism (Makhasi & Rahimmadhi, 2020).

For instance, the discourse on halal tourism by Vice President candidate Sandiaga Uno sparked a rejection of the concept in Bali in 2019. Statements made by Uno were met with disapproval by the Governor of Bali, who warned against politicizing the concept of haram and halal in Bali for political gain. The Head of the Bali Tourism Office also voiced concerns that the application of halal tourism to Bali's tourist attractions could compromise the original identity of Bali tourism, which is known for its cultural tourism appeal. The Governor of Bali suggested that the development of halal tourism could be focused on other areas that may not have been explored, to avoid diluting Bali's identity.

Similarly, in the Lake Toba region of North Sumatra Province, there has been hesitancy to adopt the concept of halal tourism due to concerns that it may erode local identity and culture. This is due in part to the area's culinary dishes that are made from processed pork, creating a misunderstanding of the concept of halal tourism. However, the local government's proposal to build halal tourism in the Lake Toba region is not aimed at eliminating the region's original identity but instead hopes to coexist with local wisdom without compromising either.

Overall, the opposition to halal tourism in Indonesia may be attributed to concerns about cultural identity and a fear of eroding local traditions. However, the politicization of the issue and the involvement of various associations compared to government agencies in the development of the halal tourism model have also hindered its progress. Unlike in Malaysia, where the government and existing associations work together to promote halal

tourism, halal tourism in Indonesia has become a tool of political contestation rather than an attempt to create a new tourism model that can benefit the country's economy.

The emergence of halal tourism in Indonesia has been met with significant opposition in various regions, which suggests a potential misunderstanding of the concept. The primary term used in Indonesia for this type of tourism is "halal tourism," while Malaysia has opted for "Muslim-friendly tourism." According to our interview with Roslan Othman, Minister Counselor for Tourism at the Malaysian Embassy in Jakarta, using the term "Muslim-friendly" may be more appropriate for countries with predominantly Muslim populations since the entire country can be deemed halal. Moreover, "Muslim-friendly" appears to be a more flexible and accommodating term for Muslim tourists' needs, whereas "halal" is more rigid due to the strict restrictions imposed by Islamic sharia. Nevertheless, it is noteworthy that various tourist destinations in Indonesia have already started offering halal-certified food options and places of worship, which cater to the needs of Muslim tourists.

In Indonesia, the politicization of halal tourism has caused opposition in some areas. However, in DKI Jakarta, the capital city, there is a process to de-politicize halal tourism. KH Masduki Baidlowi, the Head of Information and Communication Division of the MUI, stated at a Halal Tourism Indonesia Focus Group Discussion (FGD) that halal tourism is more about attracting foreign visitors and offering new tourism concepts. While some still associate halal tourism with Islamization, the growing number of Muslim communities worldwide creates a large market niche for halal tourism, which can benefit Indonesia. It is important to understand that halal tourism is not the same as religious tourism but rather an extended service and facility for Muslim travelers. Socialization, exhibitions, and promotions are necessary to equalize the perception of Muslim-friendly tourism, particularly in Jakarta.

The Minister of Tourism and Creative Economy, Sandiaga Uno, emphasized that halal tourism is not about legalizing tourist attractions but providing additional services that meet the needs and experiences of Muslim tourists. The government aims to focus on Length of Stay and Spending rather than quantity. Halal tourism with additional services provided by business actors is expected to meet the halal category. These services include halal food as a Need to Have, availability of toilets for Muslims and Muslim women as Good to Have, and availability of recreational facilities that are Muslim and family-friendly as Nice to Have. By focusing on these additional services, the government hopes to provide a better experience for Muslim tourists visiting Indonesia.

Conclusions

It is clear that Malaysia and Indonesia have been promoting their Islamic identity through various means including Halal tourism. However, their path in projecting their Islamic identity abroad differ. Malaysia has been actively promoting itself as a leading Halal tourism destination and has invested in the development of Halal tourism infrastructure. The government has also established various initiatives to promote Islamic tourism, such as the Islamic Tourism Centre and the Malaysia Halal Council. Malaysia has been successful in

attracting Muslim tourists from around the world, including from the Middle East and Asia, by offering Halal food, prayer facilities, and Muslim-friendly accommodation options.

On the other hand, Indonesia has taken a more subtle approach to promoting its Islamic identity abroad. Although Indonesia has a large Muslim population, it also has a diverse population with a range of religious beliefs. Therefore, Indonesia's approach to promoting its Islamic identity has focused more on cultural and historical aspects than religion. The government has invested in promoting cultural tourism, such as the Borobudur and Prambanan temples, as well as traditional arts and crafts. Another difference between Malaysia and Indonesia is their level of political Islamization. While Malaysia has experienced a rise in political Islamization in recent years, with the growing influence of conservative Islamic groups, Indonesia has maintained a more moderate approach to Islamization. This may reflect in their approach to projecting their Islamic identity abroad.

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