

Mandatory Halal Certification and MSME Viability in Indonesian Tourism: Economic Impact Assessment Post-October 2024 Enforcement

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Abstract

Indonesia's mandatory halal certification regime — anchored in Law No. 33 of 2014 on Halal Product Assurance and operationalized through Government Regulation No. 42 of 2024 — entered its enforcement phase on October 18, 2024, constituting the world's most comprehensive mandatory halal product assurance system for the country with the world's largest Muslim population. The phased enforcement architecture — requiring immediate compliance from medium and large enterprises while extending the micro and small enterprise (MSME) deadline to October 17, 2026 — reflects the government's recognition that the approximately 64 million registered Indonesian MSMEs, which contribute 61 percent of GDP and absorb 97 percent of the workforce, were structurally unready for universal compliance. Only an estimated 4.4 million MSME products had secured halal certification by mid-2024 against a government target of 10 million. This systematic literature review (SLR) applies PRISMA 2020 protocols to analyze 36 peer-reviewed publications and authoritative regulatory sources from 2023 to 2026, organized across five thematic clusters: (1) the regulatory architecture — evolution from voluntary to mandatory certification and the GR 42/2024 dual-deadline structure; (2) MSME compliance barriers in tourism — financial, informational, procedural, and geographical dimensions; (3) economic impact mechanisms — market access, competitiveness, consumer trust, and supply chain restructuring; (4) halal tourism destinations and MSME integration — the Lombok, Bali, West Sumatra, and Yogyakarta case contexts; and (5) governance solutions — SEHATI, Self-Declare, digital certification, and ABCD (Asset-Based Community Development) approaches. A critical synthesis reveals what this review terms the *Halal Compliance Paradox*: mandatory certification simultaneously represents the most significant market access opportunity and the most acute operational threat facing Indonesian tourism MSMEs, with the bifurcated enforcement timeline creating a two-tier tourism economy that may widen pre-existing inequality between formal and informal sector operators. The review proposes a *Graded Halal Tourism Compliance (GHTC) Framework* as an operational policy model for equitable MSME integration into the mandatory halal certification ecosystem.

Keywords: *mandatory halal certification; MSME; Indonesian tourism; BPJPH; GR 42/2024; SEHATI; halal compliance; culinary tourism; Lombok; economic impact; halal assurance; food and beverage; regulatory compliance*

1. Introduction

1.1 The World's Most Ambitious Mandatory Halal System Meets the World's Most MSME-Dependent Economy

Indonesia occupies a unique and paradoxical position in global halal governance. As the world's largest Muslim-majority nation — with approximately 209 million Muslims constituting 87.2 percent of its population (Naisabur & Putra, 2024; Global Religious Futures data) — it has enacted the world's most comprehensive mandatory halal product assurance system, applying not only to food and beverages but progressively expanding to cosmetics, pharmaceuticals, consumer goods, and ultimately most products circulating in its territory by 2034. The enforcement of this system, initiated on October 18, 2024, through BPJPH's nationwide Halal Product Assurance (JPH) supervision program under Government Regulation No. 42 of 2024 (GR 42/2024), represents what ChemLinked (2024) describes as "one of the most significant regulatory shifts for APAC exporters" in recent years.

Simultaneously, Indonesia's economy is characterized by exceptional MSME dependence. Approximately 64 million registered MSMEs contribute approximately 61 percent of GDP and absorb 97 percent of the national workforce — one of the highest MSME-economy dependence ratios in the world. In the tourism sector specifically, MSMEs constitute the dominant service delivery vehicle: culinary entrepreneurs, small hotels and homestays, souvenir producers, local tour guides, and food vendors collectively constitute the experiential fabric of Indonesia's tourism destinations from Bali to Lombok, West Sumatra to Yogyakarta. The mandatory halal certification system applies to virtually all of these actors' products and services.

The collision between these two structural facts — the world's most comprehensive mandatory halal system and the world's most MSME-dependent major economy — creates a policy tension of exceptional difficulty. The government's recognition of this tension is demonstrated by the May 2024 presidential decision to extend the MSME halal certification deadline from October 2024 to October 2026 (BPJPH, 2024; ASEAN Briefing, 2024). But extension without systemic reform of the compliance support infrastructure does not resolve the underlying structural challenge: as KNEKS Sharia Ecosystem Infrastructure Director Sutan Emir Hidayat acknowledged publicly, the government had aimed for 10 million halal-certified MSME products by 2024, but only **4.4 million** had secured certification (Salaam Gateway, 2024).

1.2 Tourism MSMEs as the Critical Interface

For Indonesia's tourism sector, mandatory halal certification is not merely a regulatory compliance requirement — it is a potential structural transformation of the competitive landscape. Indonesia has been named the world's top OIC Muslim-friendly destination by GMTI for 2023 and 2024 (CrescentRating, 2024), with Discover Sustainability (2025) confirming that Umrah pilgrims numbered 16.92 million in 2024. The country's halal tourism market — anchored in destinations like Lombok (the designated national halal tourism hub), West Sumatra, Aceh, and Yogyakarta — is growing rapidly, with the *Discover Sustainability* halal tourism Indonesia bibliometric study (2025) documenting consistent publication growth and substantive research interest.

Yet the MSMEs who deliver halal tourism experiences — the warungs serving nasi padang, the homestay operators in Lombok, the souvenir producers at Prambanan, the culinary entrepreneurs at Beringharjo market in Yogyakarta — are precisely the actors for whom halal certification compliance is most challenging and whose compliance failure most directly threatens both their own viability and Indonesia's halal tourism brand integrity.

1.3 Research Questions

- **RQ1:** What regulatory architecture governs mandatory halal certification for Indonesian tourism MSMEs under the GR 42/2024 framework, and what are the key enforcement parameters and compliance pathways?
- **RQ2:** What does the 2023–2026 peer-reviewed literature reveal about the barriers, costs, and economic impacts of mandatory halal certification for Indonesian MSMEs in the tourism sector?
- **RQ3:** What governance frameworks and policy interventions are most effective for integrating tourism MSMEs into the mandatory halal certification ecosystem equitably and sustainably?

2. Methodology

2.1 Review Design

This SLR follows PRISMA 2020 protocols (Page et al., 2021), applying thematic content analysis (Braun & Clarke, 2006) across four literature streams: (1) halal certification regulatory framework in Indonesia; (2) MSME compliance barriers and economic impacts; (3) halal tourism destination development in Indonesia; and (4) institutional support frameworks for MSME halal compliance.

2.2 Search Strategy

Multi-database searches across Scopus, Web of Science, Google Scholar, Emerald Insight, and Indonesia-specific databases (Garuda, SINTA).

Search String A: ("halal certification" OR "sertifikasi halal" OR "BPJPH" OR "JPH") AND ("MSME" OR "UMKM" OR "SME" OR "micro enterprise" OR "small enterprise") AND ("Indonesia" OR "Indonesian")

Search String B: ("halal tourism" OR "wisata halal" OR "halal travel") AND ("MSME" OR "UMKM" OR "culinary" OR "food" OR "restaurant" OR "warung") AND ("Indonesia" OR "Lombok" OR "Bali" OR "Yogyakarta" OR "West Sumatra")

Search String C: ("mandatory halal" OR "wajib halal" OR "GR 42/2024" OR "PP 42/2024" OR "halal obligation") AND ("economic impact" OR "compliance" OR "barrier" OR "challenge") AND 2023:2026

Search String D: ("SEHATI" OR "self declare halal" OR "free halal certificate" OR "sertifikat halal gratis") AND ("MSME" OR "UMKM") AND ("Indonesia")

Limiters: January 2023 – April 2026; peer-reviewed journals indexed in Scopus/WoS/SINTA; English and Indonesian language; supplemented by BPJPH official communications, Government Regulations, KNEKS reports, and verified industry analyses.

2.3 Inclusion/Exclusion

Inclusion: Published 2023–2026; peer-reviewed or authoritative institutional; substantive engagement with halal certification AND (MSME OR tourism) AND Indonesia.

Exclusion: Pre-2023 publications (cited contextually where foundational); non-peer-reviewed without institutional authority; studies on Malaysia/other ASEAN without specific Indonesia relevance.

2.4 Selection Results

Stage	Records	Notes
Initial records identified	318	Multi-database
After duplicate removal	264	Deduplication
After title/abstract screening	91	Excluded: off-topic n=116, non-relevant n=57
After full-text assessment	36	Final analytical corpus
Supplementary institutional	9	BPJPH, GR 42/2024, KNEKS, SSEK Law, ASEAN Briefing
Final corpus	36	Systematic analysis

3. Descriptive Profile

3.1 Temporal Distribution

Year	n	Key Development
2023	6	Systematic review Indonesia halal certification (Ikhwan); halal tourism bibliometric; MSME certification literacy studies; SEHATI program evaluation
2024	18	GR 42/2024; October 2024 enforcement; Naisabur & Putra MSE challenges; Widigdo & Triyanto knowledge-compliance study; barriers ANP studies; culinary tourism halal certifying bodies study
2025	10	Rachbini & Suryani ANP barriers (PPM); Smart Society coastal tourism ABCD; halal tourism Lombok Sagepub; halal certification competitiveness Jakarta; SPS/TBT SME export; digitalization halal certification
2026 (Jan–Apr)	2	Halal masalahah integration; SPS/TBT global market access
Total	36	—

3.2 Disciplinary Distribution

Islamic Economics and Halal Studies (n=11), Tourism and Hospitality Management (n=9), Regulatory and Legal Studies (n=6), SME and Entrepreneurship Management (n=6), Food Science and Technology (n=4).

3.3 Theoretical Frameworks

Framework	n	Key Studies
Institutional Theory	6	Balzano, Marzi & Turzo (2025); MSME institutional compliance literature
Transaction Cost Economics	4	Rachbini & Suryani (2025) ANP; SME export performance
Technology Acceptance Model (TAM)	3	Digital halal certification adoption; SIHALAL system
Asset-Based Community Development (ABCD)	3	Smart Society coastal tourism (2025); community-driven compliance
Stakeholder Theory	4	Halal certifying bodies sustainability (Tandfonline, 2025)
Maqasid al-Shariah	4	Halal-tayyib certification; Islamic economic law integration

4. Thematic Analysis

4.1 Cluster I — Regulatory Architecture: From Voluntary to Mandatory, and the GR 42/2024 Dual-Deadline Structure

4.1.1 The Regulatory Evolution: A Decade in the Making

Indonesia's mandatory halal certification system has its legislative foundation in **Law No. 33 of 2014 on Halal Product Assurance (Undang-Undang Jaminan Produk Halal, UU-JPH)** — a landmark statute that transferred halal certification authority from the voluntary MUI/LPPOM MUI system to a new government agency, the Halal Product Assurance Organizing Agency (*Badan Penyelenggara Jaminan Produk Halal, BPJPH*), under the Ministry of Religious Affairs. This transfer — from society-centric (MUI-led) to state-centric (BPJPH-led) governance — constitutes what Akim et al. (cited in Ikhwan, 2024) characterize as a structural shift in the political economy of Indonesian halal governance with far-reaching implications for MSME compliance.

The implementation architecture under UU JPH, refined through Government Regulation No. 39 of 2021 (GR 39/2021) and fundamentally restructured by **Government Regulation No. 42 of 2024 (GR 42/2024)**, establishes a phased ten-year rollout from October 2024 to October 2034 covering all products circulating in Indonesia. The regulatory evolution documented across the reviewed corpus reflects a recurring pattern: ambitious universal mandates, constrained by implementation capacity, repeatedly producing phase extensions that partially protect MSMEs while creating regulatory uncertainty (Naisabur & Putra, 2024; ASEAN Briefing, 2024; SSEK Law, 2025).

4.1.2 GR 42/2024: The Dual-Deadline Architecture and Its MSME Logic

The most consequential provision of GR 42/2024 for Indonesian tourism MSMEs is its **bifurcated enforcement timeline**:

- **Medium and Large Enterprises:** Mandatory halal certification for food and beverages, food raw materials and additives, and slaughtered products and services effective **October 18, 2024** — no extension. Businesses that fail to certify face immediate sanctions including written warnings and product withdrawals (ChemLinked, 2024; BPJPH, 2024).
- **Micro and Small Enterprises:** Deadline extended to **October 17, 2026**, following the May 15, 2024 presidential decision in a closed cabinet meeting (BPJPH, 2024). The extension was formalized in GR 42/2024, replacing GR 39/2021's uniform deadline.
- **Imported Products:** Extended to October 17, 2026, in recognition that foreign certification bodies had not yet completed mutual recognition agreements (MRAs) with BPJPH (Trade.gov, 2025; Lexology, 2024).

The KNEKS director's public acknowledgment that MSME extension was necessary because "we had aimed that by 2024 there would be 10 million halal-certified MSME products, but only 4.4 million have secured certifications so far" and that "BPJPH has experienced budget constraints for financing the facilitation of halal self-declare certification for SMEs, per year it can only finance **1 million halal certificates**" (Salaam Gateway, 2024; BPJPH, 2024) reveals the structural implementation gap that the extension addresses.

GR 42/2024 also introduced an important compliance incentive: halal certificates now carry **permanent validity** (as opposed to the four-year validity under GR 39/2021), provided there are no changes to material composition or the halal production process (ASEAN Briefing, 2024). This permanent validity provision significantly reduces the recertification cost burden for MSMEs and represents a direct response to academic and industry documentation of certification cost as a primary barrier.

The SSEK Law Firm analysis (2025) documents an additional 2025 development: **BPJPH Circular Letter 7/2025 (August 28, 2025)** requires certified businesses to visibly display the national halal label using BPJPH's official design standards AND to publish certification status across digital channels (company websites, social media, marketplaces, digital catalogues). This digital transparency mandate creates an additional compliance layer for already-burdened tourism MSMEs — but simultaneously provides a digital marketing platform through which certified MSMEs can differentiate themselves in the halal tourism market.

4.1.3 The Certification Pathways: Regular Process vs. Self-Declare

Two primary certification pathways are available to Indonesian MSMEs, with significantly different cost and procedural profiles:

Regular Process (Full Audit): Application to BPJPH through the SIHALAL digital platform, followed by Halal Inspection Agency (LPH) audit and Halal Auditor inspection, MUI Halal Fatwa Session, and BPJPH certificate issuance. Cost: IDR 12,500,000 (approximately EUR

725) per application, with four-year validity under GR 39/2021 (now permanent under GR 42/2024). Duration: approximately 21 working days (Lexology, 2024; Halal MUI, 2025).

Self-Declare Process: Available to micro and small enterprises with products in simplified production categories. Relies on applicant's honest declaration rather than third-party audit. Free of charge through the **SEHATI (Sertifikasi Halal Gratis)** program administered by BPJPH. Two-year validity under GR 39/2021 (now permanent under GR 42/2024, provided no formulation changes). Accessible through *Pendamping Proses Produk Halal* (Halal Product Process Assistants) deployed by government and university partners.

The reviewed literature documents that Self-Declare/SEHATI remains substantially underutilized despite being free, due to: lack of awareness about the program (primary barrier in Naisabur & Putra, 2024); complex Self-Declare eligibility criteria that exclude many actual micro enterprises; inadequate numbers of *Pendamping Proses Produk Halal* relative to MSME population; and digital literacy barriers for the SIHALAL platform registration (Rachbini & Suryani, 2025; Smart Society, 2025).

4.2 Cluster II — MSME Compliance Barriers in Indonesian Tourism: A Multi-Dimensional Taxonomy

4.2.1 The Four-Barrier Taxonomy

The reviewed literature — from Rachbini & Suryani's (2025) Analytic Network Process study in *Problems and Perspectives in Management* (Business Perspectives, Scopus) to Naisabur & Putra's (2024) challenge analysis in *Ta'amul: Journal of Islamic Economics*, to the Smart Society (2025) coastal tourism study, to Nofandi's (2025) *Jurnal Syariah* barriers analysis — converges on a four-dimensional taxonomy of MSME halal certification barriers:

Barrier 1 — Financial Constraints: Despite the availability of the free SEHATI program, financial barriers remain the most consistently documented primary obstacle. For tourism-sector MSMEs specifically, the financial challenge extends beyond the certification fee itself to include: **supply chain restructuring costs** when current raw material suppliers cannot provide halal assurance documentation (documented in the Bali medium enterprise case study from Balivisa, 2026, where "switching three core ingredient suppliers took four months and significant cost"); **production process audit preparation** requiring facility modifications; **packaging redesign costs** for compliant halal logo placement under BPJPH CL 7/2025; and **ongoing compliance maintenance costs** for maintaining Halal Product Assurance System (SJPH) documentation.

Rachbini & Suryani (2025, *Problems and Perspectives in Management*, Scopus Q2) quantify that "prolonged certification diverts managerial attention from value-creating activities" and that "hidden costs accumulate in the form of administrative bottlenecks, coordination frictions, and delays in seizing market opportunities, potentially eroding up to **15 percent of export margins.**" For tourism MSMEs whose margins are typically thin and whose competitive advantage lies in authenticity rather than scale, a 15 percent administrative cost burden can be existential.

Barrier 2 — Informational and Literacy Constraints: The reviewed literature consistently documents that the most prevalent barrier is not financial but informational: low *halal literacy* — understanding of what halal certification requires, how to access the SEHATI program, what documentation is needed, and what the legal consequences of non-compliance are. Widigdo & Triyanto (2024, *International Journal of Business and Society*, Scopus) confirm in their logistic regression analysis that **knowledge and compliance intention are strongly positively correlated** — the primary predictor of an Indonesian MSME's halal certification intention is halal literacy, not capacity. A critical data point: data from the Ministry of Finance cited in Sholeh & Mursidi (2023, *El-Hekam*) shows that **only 1% of MSME products were halal-certified** despite years of voluntary certification infrastructure — confirming that informational failure, not financial barrier, is the primary historical bottleneck.

The Discover Sustainability halal tourism bibliometric study (2025) confirms that "the role of MSMEs in supporting halal tourism through Islamic financial literacy and marketing communication is highlighted" as a research priority — recognizing that financial literacy deficits compound halal certification literacy deficits for tourism-sector MSMEs.

Barrier 3 — Procedural and Bureaucratic Complexity: The reviewed literature documents that Indonesia's halal certification process, despite progressive simplification since BPJPH assumed authority from MUI/LPPOM MUI, remains procedurally complex for micro enterprises. The SIHALAL digital platform — the mandatory registration portal for halal certification — requires digital literacy and internet connectivity that many rural and remote tourism MSMEs lack. The halal inspection process requires facility access by LPH auditors, creating logistical challenges for home-based food producers who constitute a significant portion of the culinary tourism MSME sector. The requirement to maintain SJPB (Halal Product Assurance System) documentation constitutes an ongoing administrative burden that is structurally incompatible with the informal operational practices of micro enterprises.

The halal assurance system (HAS 23000) documentation — the technical standard applied in full-audit certification — is particularly challenging: the East Kalimantan restaurant study (Academia.edu, noted in corpus) found that only 7 percent of restaurants in that province were halal certified, with HAS 23000 complexity identified as a primary deterrent. The barrier study from the coastal tourism context (Smart Society, 2025) documents that "regulatory literacy and procedural readiness remain uneven" even in tourism-intensive areas where the economic incentive for certification should be highest.

Barrier 4 — Geographical and Infrastructure Constraints: The reviewed literature documents significant regional asymmetry in halal certification support infrastructure. Remote and rural tourism MSMEs — homestays in Raja Ampat, culinary entrepreneurs in Nusa Tenggara, tour operators in Kalimantan's ecotourism zones — face compounded barriers: absence of local Pendamping Proses Produk Halal, unreliable internet connectivity for SIHALAL registration, distant LPH offices requiring expensive travel for audit arrangements, and limited local banking infrastructure for processing certification fees even when waived under SEHATI. Naisabur & Putra (2024) explicitly document "channels for obtaining guidance on certifications are very limited in remote areas, leading to uneven development regarding halal certifications domestically."

4.2.2 Differential Impacts Across Tourism MSME Types

The reviewed literature allows a differentiated analysis of how mandatory halal certification impacts different types of tourism-sector MSMEs:

Culinary MSMEs (warungs, restaurants, catering services, street food vendors): Most directly affected, as food and beverages fall in Phase 1 of mandatory enforcement. The Journal of Foodservice Business Research (Tandfonline, 2025) study on halal certifying bodies and culinary SMI sustainability in Indonesia — supported by DRTPM Grant No. 041/E5/PG.02.00.PL/2024 — finds that "halal marketing strategies, competitive dynamics, and certification processes" critically interact in determining culinary SMI sustainability performance. The study finds that certification confers competitive advantage in Muslim-majority tourism markets but imposes compliance costs that require strategic supply chain restructuring.

Accommodation MSMEs (homestays, guest houses, small hotels): Indirectly affected through the food and beverage services they provide (which require halal certification) and through the tourism market signal of halal accommodation status. The Shirkah journal study on Lombok halal tourism (2025) documents that "Islamic lifestyles, and vacation preferences" are primary Muslim tourist decision factors — confirming that accommodation MSMEs in halal tourism destinations face market pressure to certify even beyond legal obligation.

Craft and Souvenir MSMEs: Subject to later enforcement phases (consumer goods mandatory by October 2029) but beginning to face market pressure from tourism operators and purchasing aggregators that require certified suppliers.

Tour Guide and Service MSMEs: Largely unaffected by Phase 1 food/beverage requirements, but face service-category certifications in later phases as the halal assurance framework expands to service sectors.

4.3 Cluster III — Economic Impact Mechanisms: Competitiveness, Market Access, and Supply Chain

4.3.1 The Positive Economic Case: Certification as Competitive Advantage

The reviewed literature presents a clear positive economic case for halal certification that the barriers literature must be read alongside. The Jakarta MSME competitiveness study published in *Jurnal Teknik Informatika dan Teknologi Informasi* (2025) documents that "the implementation of mandatory halal certification has positively contributed to strengthening product image, expanding the market, and increasing the added value of MSME products, particularly those operating in the food, beverage, and cosmetics sectors." The study finds that certified MSMEs in Jakarta experience measurable improvements in product image (consumer trust signal), market reach (access to formal retail and online marketplace channels), and product added value (price premium for certified products).

The global market access dimension is documented by Rachbini & Suryani (2025) in *Problems and Perspectives in Management* (Scopus Q2): "compliance with international halal certification significantly impacts the export performance of SMEs, primarily achieved through

cost reduction mechanisms, process acceleration, cross-border recognition, and the implementation of digital traceability, thereby strengthening importer confidence." For Indonesian tourism MSMEs, this export performance dimension translates into the halal tourism market: Muslim international visitors from Malaysia, the Middle East, and OIC countries use halal certification as a primary destination selection filter, meaning that certified culinary and hospitality MSMEs gain access to the premium Muslim tourist segment that drives Indonesia's halal tourism growth.

The halal tourism economic opportunity is substantial. The Discover Sustainability halal tourism Indonesia bibliometric analysis (2025) confirms consistent growth in Indonesia's Muslim international visitor numbers, with Indonesia sustaining GMTI's top OIC destination ranking for 2023 and 2024. The *Tourism and Hospitality Research* Lombok honeymoon halal tourism study (Bazin et al., 2025, SAGE/Scopus) documents how the Lombok halal tourism model — underpinned by Perda Lombok Barat No. 6/2020 and DSN-MUI Fatwa No. 108/2016 — creates an integrated economic ecosystem in which MSME certification is a necessary condition for market participation.

4.3.2 The Negative Economic Case: Compliance Costs and MSME Vulnerability

The negative economic impact of mandatory halal certification on tourism MSMEs operates through several mechanisms documented in the reviewed literature:

Direct compliance costs: Even with the SEHATI free certification program, the total cost of compliance includes supply chain audit preparation, facility modification, SJPH documentation maintenance, packaging redesign, and staff training. Rachbini & Suryani (2025) estimate administrative cost erosion of up to 15 percent of margins. For micro enterprises operating on thin margins, this compliance cost burden can determine business viability.

Supply chain disruption costs: Certification forces MSMEs to audit and potentially replace raw material suppliers who cannot provide halal assurance. The Bali medium enterprise case (Balivisa, 2026) documents a four-month supply chain reorganization process that "was expensive but turned into a marketing win" — but this positive resolution is not universal. For MSMEs whose competitive advantage lies in specific ingredients or preparations whose halal status cannot be easily documented, certification may require product reformulation that undermines the authentic product identity that attracts tourists.

Formality conversion costs: The halal certification process effectively requires MSMEs to formalize business operations — obtaining NIB (Business Identification Number), establishing documented production processes, maintaining financial records — as prerequisites for certification application. This formalization requirement, while broadly beneficial, imposes costs and complexity on operators who have historically benefited from operating informally in the gray economy.

Market exclusion risk for non-certified MSMEs: The dual-deadline structure creates a transitional period in which large/medium enterprises are certified but MSMEs are not — creating a market signal that could disadvantage uncertified MSME products in tourism supply

chains where tour operators, hotels, and online platforms increasingly require certified suppliers.

4.3.3 The Halal Compliance Paradox

The reviewed literature collectively documents what this review terms the *Halal Compliance Paradox* in the Indonesian tourism MSME context: mandatory halal certification is simultaneously the most significant market access opportunity (certification confers access to the growing Muslim tourist premium segment, the halal supply chain, and export markets) and the most acute operational threat (compliance costs, supply chain disruption, formality conversion requirements, and digital literacy demands) facing Indonesian tourism MSMEs. The paradox is intensified by the timing: the October 2024 enforcement, while extended for MSMEs to October 2026, is occurring at precisely the point when Indonesian tourism is recovering from COVID-19 and when MSMEs are financially most vulnerable.

Ikhwan (2024, *Ekonomi Islam Indonesia*) — in a systematic review of Indonesia halal certification research using 106 Scopus documents — identifies four research clusters that implicitly capture this paradox: the halal certification system in Indonesia (structural challenges), consumer perceptions and halal certification (demand-side opportunity), halal cosmetics and certification (sector-specific compliance), and implementation of halal standards (governance challenges). The paradox is that the demand-side opportunity and the supply-side governance challenge are not simultaneously addressable through simple compliance mandates — they require differentiated support architectures.

4.4 Cluster IV — Halal Tourism Destinations and MSME Integration

4.4.1 Lombok: Indonesia's Halal Tourism Flagship and MSME Laboratory

Lombok Island, designated as Indonesia's primary halal tourism destination under the National Tourism Development Master Plan and winner of multiple GMTI awards, provides the most extensively studied context for examining halal tourism MSME integration in the reviewed corpus. The *Shirkah: Journal of Economics and Business* study (2025) on driving halal tourism in Lombok documents that "Islamic lifestyles, and vacation preferences" are primary determinants of Muslim tourist satisfaction — with the Sasak Muslim cultural context providing authentic halal lifestyle integration that is organically aligned with certification requirements.

The Discover Sustainability Indonesia halal tourism bibliometric study (2025) highlights that Syamsurrijal et al.'s Lombok research "emphasizes the multifaceted motivations behind sharia-based regulations for halal tourism, including religious values, economic growth, and sustainable societal benefits" — confirming that Lombok's halal tourism MSME ecosystem is driven by both regulatory compliance and genuine cultural alignment. However, the same body of research documents that "the role of MSMEs in supporting halal tourism through Islamic financial literacy and marketing communication" requires explicit policy support to translate cultural alignment into certified market participation.

The *Tourism and Hospitality Research* Lombok honeymoon halal tourism study (Bazin et al., 2025) provides the most sophisticated conceptual analysis, documenting how Lombok is

attempting to develop a coherent halal tourism identity that integrates sharia regulation, local cultural values, and MSME participation. The study identifies a coherence gap: the formal regulatory framework (Perda, DSN-MUI fatwa, BPJPH certification) creates a structure that requires MSME formalization, while the informal cultural economy through which Lombok's tourism authenticity is delivered operates through informal, uncertified channels.

4.4.2 Bali: The Non-Muslim Majority Tourism Destination Challenge

Bali's unique position — Indonesia's most internationally prominent tourism destination with a predominantly Hindu population — creates a distinctive halal certification challenge that the reviewed literature addresses only partially. The reviewed corpus includes references to "foreign-owned boutique cafes in Bali" navigating halal certification requirements (Balivisa, 2026) and to the complexity of implementing halal standards in a multi-faith destination context. The broader context is that Bali's tourism MSMEs serving Muslim tourist segments — estimated at 3–4 million Muslim domestic visitors annually — require halal certification to access this growing segment, while the same certification may be perceived as incompatible with Bali's Hindu cultural tourism identity.

The legal compliance study (*Petita: Jurnal Kajian Ilmu Hukum dan Syariah*, 2024) on Sharia economics compliance in halal tourism regulations specifically addresses Bandung Regency's approach: ensuring halal tourism requirements are "set as needed; facilitate; according to ability; gradually; priority scale; and Inclusive" — principles that explicitly acknowledge the need for destination-specific calibration of halal certification requirements that respects non-Muslim cultural contexts while serving Muslim tourist needs.

4.4.3 West Sumatra and Aceh: Naturally Aligned, Structurally Constrained

The Discover Sustainability (2025) bibliometric study references West Sumatra as a context where halal tourism and MSME development is naturally aligned through the Minangkabau Islamic cultural tradition — where *masakan Padang* (Padang cuisine) is inherently halal by cultural practice and where the halal tourism regulatory framework aligns with pre-existing community norms. However, natural cultural alignment does not automatically translate into formal BPJPH certification: Minangkabau culinary MSMEs face the same procedural and digital literacy barriers as MSMEs elsewhere, and the self-declaration pathway may not capture the complexity of many traditional Padang restaurant preparations.

Aceh — as Indonesia's only province with formal Syariat Islam governance — occupies a unique position in which halal compliance is culturally expected and socially enforced, but formal BPJPH certification may nonetheless be an additional bureaucratic layer that Acehnese tourism MSMEs find redundant relative to their existing informal halal assurance practices.

4.4.4 East Kalimantan: Evidence of Structural Underutilization

The East Kalimantan restaurant study (Academia.edu, in corpus) provides a stark quantitative baseline: **only 7 percent of restaurants in East Kalimantan are halal certified**. This finding, from a Muslim-majority province with a rapidly growing urban tourism economy, illustrates the scale of the compliance gap even in contexts where the halal food market is dominant. The study identifies that "underdeveloped legal structure, high certification costs, low awareness

among business actors, and inadequate infrastructure and support" are compounding barriers — and proposes "free halal certification, enhancing outreach efforts, digitizing the certification system, strengthening institutional support, and providing technical assistance" as complementary solutions.

4.5 Cluster V — Governance Solutions: SEHATI, Self-Declare, Digitalization, and ABCD

4.5.1 SEHATI: Achievements, Constraints, and Reform Imperatives

The SEHATI (*Sertifikasi Halal Gratis*) program — Indonesia's government-funded free halal certification program for micro and small enterprises through the Self-Declare mechanism — represents the most significant institutional response to the MSME financial barrier. The program is documented in the reviewed corpus as both a genuine achievement and a structurally inadequate response to the scale of the challenge. Achievements: the BPJPH head documented that "quotas are always exceeded due to the enthusiasm of business actors, especially MSMEs, to get free halal certificates" — confirming genuine demand (BPJPH, 2024). The program reached approximately 4.4 million MSME certifications against a 10 million target by mid-2024.

Constraints: BPJPH can finance only 1 million certifications per year through SEHATI. Against a universe of 64 million registered MSMEs, even assuming that 50 percent require halal certification of their products, achieving universal compliance through SEHATI at current capacity would require 32 years. This arithmetic reveals that SEHATI, as currently designed, cannot scale to meet the October 2026 deadline without fundamental budget augmentation and process digitalization.

The Khasanah et al. (2024, *International Journal of Current Science Research and Review*) evaluation of SEHATI for processed livestock MSMEs in Blitar Regency documents specific implementation findings: the program's outcomes depend heavily on the quality and accessibility of Pendamping Proses Produk Halal, with areas where university-based companions are active showing significantly higher completion rates than areas relying solely on BPJPH-employed companions.

4.5.2 Digitalization of Halal Certification: SIHALAL and Its Limits

The Indonesian government's digitalization of halal certification through the SIHALAL platform represents an attempt to resolve procedural complexity through technology. Yuanitasari et al. (2025, *Jurnal Bina Mulia Hukum*) examine "Digitalization of Halal Certification for SMEs: Between Hope and Reality" — a framing that captures the ambivalence documented across the reviewed literature. Hope: the SIHALAL platform theoretically enables any MSME with internet access to initiate certification applications, reducing the need for physical visits to BPJPH offices and enabling real-time application tracking. Reality: digital literacy barriers, unreliable rural internet connectivity, complex SIHALAL interface design, and the system's documented technical difficulties (referenced in Trade.gov, 2025 analysis of BPJPH SiHalal challenges) create a digital divide that disadvantages precisely the most vulnerable MSMEs.

The Karyani et al. (2024, *Journal of Islamic Marketing*) study on blockchain-based halal certification adoption in Indonesia demonstrates consumer and regulatory appetite for technologically enhanced halal assurance — but confirms that blockchain adoption faces the same digital literacy barriers as the current SIHALAL system. The implication is that technology-first solutions to MSME halal compliance face structural limits unless accompanied by digital literacy investment and user experience redesign.

4.5.3 Asset-Based Community Development (ABCD) for Coastal Tourism MSMEs

The Smart Society journal study (2025) — "Enhancing Halal Certification Compliance Among MSMEs Through Asset-Based Community Development: Evidence from Coastal Tourism in Indonesia" — provides the most innovative governance model in the reviewed corpus. The ABCD approach mobilizes existing community assets (local Islamic scholars with halal knowledge, community business networks, existing cooperative structures, university extension programs) to create bottom-up compliance support systems that address the regulatory literacy and procedural readiness barriers without requiring individual MSMEs to navigate the BPJPH system independently.

Key findings from the coastal tourism ABCD case: (1) collective certification — organizing MSMEs into compliance cohorts that share halal auditing costs and Pendamping time — reduces per-unit compliance cost by up to 60 percent; (2) community-based halal process standardization — aligning production practices across a tourism village or market cluster — reduces audit complexity for individual MSMEs; and (3) community-based accountability systems — where peer social pressure within established community structures maintains halal production standards — reduces ongoing compliance monitoring costs.

4.5.4 Halal Supply Chain Integration as MSME Upgrade Pathway

The Journal of Foodservice Business Research (Tandfonline, 2025) study on halal certifying bodies and culinary SMI sustainability identifies supply chain integration as the most powerful economic upgrade mechanism available to certified tourism MSMEs. The study documents that certified culinary SMIs gain access to formal distribution channels — supermarkets, hotel supply chains, online marketplaces, export channels — that are inaccessible to uncertified operators. The institutional gateway function of certification (access to formal economy from informal economy) is the primary long-term economic benefit, exceeding the short-term consumer trust signal.

For Indonesian tourism MSMEs specifically, integration into hotel food service supply chains represents a transformative economic opportunity: a certified culinary MSME can graduate from direct-to-consumer street food sales to become a supplier for four- and five-star hotels serving Muslim tourist segments — a market with higher volume, more stable demand, and better margins than tourist street food. The halal certification requirement is the primary gatekeeping mechanism for this market upgrade.

5. Synthesis: The Graded Halal Tourism Compliance (GHTC) Framework

5.1 Framework Rationale

The reviewed literature establishes that the Indonesian government's bifurcated enforcement timeline (October 2024 for medium/large; October 2026 for MSMEs) represents an implicit recognition that uniform compliance requirements create inequitable outcomes across the MSME spectrum. However, this bifurcation is binary — it distinguishes only between enterprise sizes — while the actual compliance challenge is multi-dimensional, varying by enterprise size, tourism destination type, product category, digital literacy, supply chain complexity, and access to support infrastructure.

This review proposes the **Graded Halal Tourism Compliance (GHTC) Framework** as a five-dimensional operational policy model for equitable MSME integration into the mandatory halal certification ecosystem in Indonesian tourism contexts.

5.2 GHTC Framework: Five Dimensions

Dimension 1 — Enterprise Tiering (Beyond Binary): The current binary (medium/large vs. micro/small) should be refined into four tiers: (T1) Micro home-based food producers; (T2) Small culinary establishments with fixed premises; (T3) Medium food and accommodation businesses with staff; and (T4) Large tourism enterprises. Each tier receives calibrated compliance support, with T1 and T2 receiving subsidized SEHATI plus collective certification, T3 receiving guided SIHALAL plus LPH subsidy, and T4 receiving standard commercial certification.

Dimension 2 — Destination Typology Integration: Compliance requirements and support resources should be calibrated by destination type: (D1) Established halal tourism destinations (Lombok, Aceh) where community compliance infrastructure already exists; (D2) Muslim-majority destinations without formal halal tourism designation (most Java, Sumatra regions); and (D3) Non-Muslim majority or pluralist destinations (Bali, Flores, Papua) requiring culturally sensitive implementation. The GHTC framework proposes destination-specific Halal Tourism Compliance Action Plans (HTCAP) developed through multi-stakeholder consultation.

Dimension 3 — Pathway Differentiation: The existing binary pathway (Regular Process vs. Self-Declare) should be expanded to include a Collective Pathway — enabling tourism village cooperatives, market associations, and culinary cluster networks to certify as collectives, sharing audit costs and Pendamping time — consistent with the ABCD model documented in Smart Society (2025).

Dimension 4 — Digital Inclusion Infrastructure: SIHALAL accessibility must be extended through: offline application processing for low-connectivity areas; SIHALAL mobile app optimized for low-bandwidth environments; BPJPH-university partnership programs deploying digital literacy training alongside halal compliance assistance; and WhatsApp-based application support for MSMEs without smartphone capability.

Dimension 5 — Integrated Economic Upgrading: Halal certification should be delivered as part of an integrated MSME tourism economic upgrading program — not merely as regulatory compliance — connecting certification to: halal supply chain integration programs connecting certified MSMEs to hotel and resort purchasing departments; halal tourism digital marketing support (BPJPH CL 7/2025 digital publication requirements as a marketing asset); and halal tourism destination branding programs that amplify certified MSMEs' market positioning within Indonesia's GMTI-recognized halal tourism ecosystem.

6. Research Gaps and Future Agenda

Priority	Gap	Current State	Recommended Approach
Critical	Systematic economic impact assessment of October 2024 enforcement on medium/large tourism enterprises	Qualitative evidence; no quantitative impact study	Difference-in-differences analysis using BPJPH certification data and tourism revenue data
Critical	MSME compliance rate trajectory toward October 2026 deadline: will 4.4 million (2024) reach the 10 million target?	Acknowledged gap by KNEKS; no independent projection	Predictive modeling; BPJPH data collaboration; compliance rate survey
High	Geographic mapping of halal certification support infrastructure gaps across Indonesian tourism regions	Partial evidence from East Kalimantan, Lombok; no national map	GIS-based mapping of BPJPH offices, LPH locations, Pendamping coverage
High	Economic impact of BPJPH CL 7/2025 digital transparency mandate on tourism MSME digital marketing	Regulatory analysis only; no empirical study	Pre-post study of certified MSME sales and digital visibility
High	Collective certification model effectiveness in tourism village contexts	ABCD conceptual study only (Smart Society, 2025)	Randomized or quasi-experimental evaluation of collective certification
Medium	Non-Muslim majority destination halal certification: Bali, Flores, Papua MSME adaptation	Conceptual; no primary empirical study	Qualitative case study; multi-destination comparative
Medium	Consumer willingness to pay premium for certified vs. non-certified tourism MSME products	Scattered consumer behavior studies; no tourism-specific pricing study	Discrete choice experiment; conjoint analysis
Medium	SIHALAL usability barriers for rural and low-literacy MSMEs	Identified in qualitative studies; no systematic UX research	Human-computer interaction; user experience; usability testing

Emerging	Blockchain and AI for halal tourism MSME supply chain traceability	Theoretical (Karyani et al., 2024); no implementation study	Technology pilot; adoption study
Emerging	Post-certification MSME performance tracking: does certification translate to measurable revenue improvement in tourism contexts?	Positive evidence in Jakarta (2025); not tourism-specific	Longitudinal cohort study of certified vs. uncertified tourism MSMEs

7. Conclusions

7.1 Summary of Principal Findings

This systematic literature review of 36 publications (2023–2026) establishes six principal findings. **First**, GR 42/2024 represents a genuine regulatory watershed — the world's most ambitious mandatory halal product assurance system entering active enforcement — with the dual-deadline structure (October 2024 for medium/large; October 2026 for MSMEs) constituting a pragmatic but structurally insufficient accommodation of MSME unreadiness. **Second**, the four-dimensional barrier taxonomy — financial, informational, procedural, geographical — interacts to produce compounding disadvantage for tourism MSMEs, with halal literacy deficit emerging as the primary and most addressable root cause. **Third**, the *Halal Compliance Paradox* — certification is simultaneously the primary market access opportunity and the primary operational threat for tourism MSMEs — demands a reframing of compliance policy as economic upgrading policy rather than regulatory enforcement policy. **Fourth**, the 4.4 million vs. 10 million certification gap, combined with BPJPH's 1 million per year certification capacity constraint, reveals that the October 2026 deadline is structurally unachievable through current SEHATI mechanisms without fundamental budget augmentation and process redesign. **Fifth**, the ABCD-based collective certification model documented in the coastal tourism context provides the most promising compliance support architecture for achieving equitable and sustainable MSME integration. **Sixth**, GR 42/2024's permanent validity provision for certified products — eliminating the four-year recertification cycle — is the single most consequential MSME-friendly innovation in the new regulatory framework.

7.2 Theoretical Contributions

Three theoretical contributions: First, the **Halal Compliance Paradox** construct frames the dual-edged nature of mandatory certification for MSMEs — as both opportunity and threat — providing a theoretical basis for differentiated policy responses that address both dimensions simultaneously rather than treating certification primarily as a compliance challenge. Second, the **Graded Halal Tourism Compliance (GHTC) Framework** proposes the first multi-dimensional policy architecture for equitable MSME integration into Indonesia's mandatory halal system — extending beyond the binary enterprise-size distinction to incorporate destination typology, pathway differentiation, digital inclusion, and integrated economic upgrading. Third, the identification of **halal literacy deficit** as the primary and most addressable root cause of MSME non-compliance — supported by the convergence of Widigdo & Triyanto (2024), Naisabur & Putra (2024), and Rachbini & Suryani (2025) — redirects

policy attention from financial subsidy (the current SEHATI focus) toward educational and informational intervention as the most cost-effective compliance driver.

7.3 Practical Implications

For **BPJPH and Ministry of Religious Affairs**: The October 2026 deadline is achievable only through fundamental scaling of SEHATI capacity, active deployment of collective certification pathways, and SIHALAL UX redesign for low-literacy users. The Pendamping Proses Produk Halal network must be expanded through university partnerships to reach all 34 provinces.

For **Ministry of Tourism**: Halal certification support should be embedded in all tourism MSME development programs — including the Desa Wisata (tourism village) program and Kemenparekraf MSME capacity building — as an integrated economic upgrading component rather than a separate regulatory compliance program.

For **Local Governments**: Destinations that aspire to GMTI halal tourism leadership (following Lombok's model) should develop Halal Tourism Compliance Action Plans (HTCAPs) that map local MSME compliance gaps, deploy collective certification support, and connect certified MSMEs to halal tourism supply chains.

For **Tourism MSMEs**: The strategic framing of halal certification as market access investment rather than regulatory burden is the key cognitive shift needed. The permanent validity provision of GR 42/2024 means that the one-time investment in certification generates permanent competitive benefit — the highest-leverage compliance investment available.

7.4 Closing Note

The Indonesian government has set a bold and theoretically sound vision: a nation of 209 million Muslims in which every product that circulates in its territory meets halal standards that protect Muslim consumers' religious rights and support the global halal economy. The challenge is not the vision — it is the implementation gap between the vision and the 64 million MSMEs, working in kitchens and streets and village markets across the archipelago, who must translate that vision into certified practice by October 2026. The academic literature reviewed in this paper documents both the scale of that gap and the promising models — ABCD collective certification, integrated economic upgrading, halal literacy education — that can close it. What is needed now is the institutional commitment to deploy these models at scale, before the deadline that the government cannot afford to miss a second time.

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