

Strategic Workforce Recovery Plan for Post-Crisis Tourism in Bali, Indonesia

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DE240004

Labour Market in Tourism

EIET

25.06.2025

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Abstract

The COVID-19 pandemic halted Bali's tourism industry so radically that it completely disrupted international arrivals, printing large numbers of unemployed individuals, mainly informal and seasonal workers. As tourism accounted for more than 50 % of Bali's regional GDP and employed thousands of individuals both directly and indirectly, the sudden shock revealed structural vulnerabilities in the tourism labor market. This report critically examines labor dynamics in Bali's tourism industry, both prior to and post-COVID-19, highlighting weaknesses such as over-reliance on low-wage, informal work, skills mismatches, and the lack of social protection. The report is grounded in tourism labor economics, human capital theory, and frameworks for crisis resilience. Short-term recovery strategies include wage subsidies in an emergency context, worker retention incentives, and flexibility for temporary migration. Long-term recovery also focuses on vocational upskilling, formalization of the tourism workforce, and partnerships and collaboration with the public and private sectors to create sustainable and ethical pathways for workers in tourism, promoting safe work environments and basic occupational health and safety standards. The study is based on secondary data analysis, utilizing credible data from the International Labour Organization (ILO), the United Nations World Tourism Organization (UNWTO), and the Indonesian Ministry of Tourism, among others. Our findings underscore the need for systemic change to enhance the resilience and inclusivity of tourism labor in Bali's post-COVID-19 environment and contribute to a broader discussion on more equitable tourism development in destinations affected by crises and emergencies.

Introduction

Tourism is the foundation of the Indonesian island of Bali's economy, with a direct contribution of approximately 53% of the region's gross regional domestic product (BPS-Provinsi Bali, 2020). Renowned for its cultural allure and natural beauty, Bali has consistently ranked highly amongst international tourism destinations within the Southeast Asia region. However, unlike any other time, the COVID-19 pandemic has created unprecedented disruption due to international border closures and the near-total suspension of global travel. Consequently, the rapid and overwhelming crash in the tourism industry of Bali triggered widespread business closures and worker displacement. By mid-2020, over 75,000 tourism workers in Bali had been either laid off or furloughed, many of whom lacked formal employment rights or access to income support (Indonesian Ministry of Tourism and Creative Economy, 2021).

The crisis highlighted fundamental structural weaknesses in Bali's tourism labor market, including dependence on informal work, dependency on seasonal work, loss of upskilling opportunities, and weak resilient employment rights. Many displaced tourism workers were compelled to transition into agriculture or informal micro-work, while others exited the workforce altogether. Moreover, the informal nature of most employment in Bali's tourism sector meant that many were without access to unemployment benefits, health insurance, or avenues of legal recourse.

Addressing the labor crisis suggests more than just short-term funding. It requires a strategic, multi-level approach to recovery that explores various economic, social, and institutional sources to support recovery. The crisis provides a unique opportunity to reframe the workforce of the tourism sector in Bali towards stronger sustainability, equity, and resilience. This report examines labor market conditions before and after the crisis in the Bali tourism sector, identifies the key vulnerabilities that exacerbated the crisis, and offers a strategic workforce recovery plan based on human capital development and ethically applied employment practices.

The report is structured as follows. Section 2 presents a literature review on tourism labor markets, workforce resilience, and crisis recovery frameworks. Section 3 outlines the methodology, including the use of secondary data and relevant analytical tools. Section 4 presents the findings on the labor market impacts of COVID-19 in Bali, including patterns of job loss, wage impacts, and skills mismatches. Section 5 presents proposed recovery strategies that

encompass both short-term and long-term approaches, focusing on re-employment, upskilling, and labor mobility. Section 6 concludes the report with a synthesis of implications and recommendations for policymakers, employers, and stakeholders in Bali's tourism economy.

Literature Review

Theoretical Frameworks

With a variety of economic and sociological frameworks. Human capital theory provides tools to establish that spending on education and training promotes productivity and economic outcomes for workers (Becker, 1993), thereby sustaining the argument for systemically upskilling and vocational training of displaced workers, which increases resilience and adaptability (Baum, 2019). Labor market segmentation theory describes the division of employment systemically into formal and informal sectors. Tourism employment in Bali is predominantly bifurcated between high-wage, well-regulated jobs and informal jobs, characterized mainly by seasonal work, a lack of contracts, and vulnerability to shocks (ILO, 2021). Work in the informal sector is part of a systemic inequality whereby informal workers do not benefit from social protections or wage security and may not be eligible for reemployment (Bianchi, 2020). Finally, the resilience framework in tourism labor research (Hall et al., 2017; Le et al., 2021) focuses on the ability of destinations to absorb shocks, adapt, and transform. In this context, resilient labor systems protect workers from shocks while also facilitating the rapid restoration of tourism employment through policy efforts and innovation.

Global Tourism Crises and Labour Impact

Past tourism crises have consistently shown patterns of workforce vulnerability. The 2003 SARS outbreak in Asia, for example, resulted in short-term job losses, with layoffs in hotels and airlines in cities such as Hong Kong and Singapore, which relied heavily on tourism as a proportion of GDP (Cooper, 2006). During the 2008 global financial crisis, widespread layoffs in the hospitality sector were observed in Spain, Greece, and Italy, highlighting the fragility of southern Europe's economies, which heavily relied on tourism (Ioannides & Gyimóthy, 2019).

Even within developed countries, previous crises have highlighted the vulnerability of the tourism industry. In developing countries, crises disproportionately affect workers because these countries often have weak institutional support, high levels of informal employment, and limited

opportunities for employment once a crisis has ended. Within the Caribbean, frequent hurricanes have exposed vulnerabilities in the tourism workforce, particularly for women and migrant workers holding precarious or seasonal jobs in tourism (Jayawardena et al., 2020).

The COVID-19 pandemic, however, is unique as it was a global crisis of unprecedented magnitude. The pandemic led to a global loss of approximately 100 million jobs in the tourism sector in 2020 alone (UNWTO, 2021). It brought forth the vulnerabilities of the people who support tourism, economically important as it is.

Pre-Crisis Labour Structure in Bali

Before the outbreak of the pandemic SARS-CoV-2, tourism in Bali was rapidly emerging as the island's most important economic sector. In 2019, tourism contributed nearly 53% of Bali's Gross Regional Domestic Product (GRDP) and employed over 1 million people, either directly or indirectly (BPS-Provinsi Bali, 2020). Most workers were concentrated in the hospitality, food and beverage, transport, and cultural tourism sectors. However, the majority of workers in Bali's tourism economy were employed informally, meaning they worked under verbal contracts, had insecure employment, no employee benefits, and no access to health and social insurance (ILO, 2020).

The Indonesian Ministry of Manpower (2019) established that approximately 60% of Bali's tourism workforce were employed in informal employment or as casual workers — with many of them being migrants from poorer regions of Indonesia. They primarily engaged in service roles, such as cleaning, waitressing, or being tour assistants. The gendered nature of tourism work in Bali also meant that women were frequently employed as low-wage, casual employees without prospects for upward mobility, as tourism companies often hired temporary workers by principle (Cukier, 2002). These existing structural inequalities made tourism workers highly vulnerable when international tourism was sidelined in early 2020.

In addition to Bali's overall labor issues, the seasonality of tourism in many destinations further complicates the job situation. Tourism peaks in the driest months (May–September), and the labor pool suffers from significant underemployment during off-seasons. Many casual or informal employees lack formalized contracts, savings, or other financial resources, making it

difficult for them to absorb the economic shock of job loss and prolonged unemployment during the pandemic (World Bank, 2021).

Institutional Gaps and Governance Failures

COVID-19 highlighted an unbridgeable gap between Indonesia's strategies for developing tourism and its labor market system. While the national government was keen to invest money in constructing and improving infrastructure (i.e., airport improvements and resort zones), it overlooked expenditures on developing the workforce. There were few mechanisms or public programs to retrain displaced workers or transition them into jobs in other sectors (AAP, 2021). Informal workers, the majority, were excluded from wage subsidies and extended unemployment payments under the existing schemes.

Moreover, labor migration policies are currently underdeveloped. While many of the Balinese returned to their villages of origin during the pandemic, there were no coordinated state efforts to support temporary labor migration (i.e., into agriculture labor) or the possible redeployment of unused capacity (i.e., digital services), which inhibited reemployment and retention of skill (Gede & Mahadewi, 2022).

Lessons from Comparable Destinations

Other tourism-reliant regions offer a helpful template for Bali's recovery from the crisis. For example, Thailand offered a national upskilling program to furloughed tourism workers in digital literacy, food service hygiene, and language skills. The course was offered online at no cost to the displaced workers (Tourism Authority of Thailand, 2021). The initiative aimed to keep dormant and displaced workers engaged in the sector and avoid a long-standing workforce of unemployed people. Similarly to Thailand, the Maldives was highly reliant on inbound tourism, so it offered temporary public employment programs to impacted hospitality staff while concurrently retraining them for future careers in environmental management and health services (ADB, 2021).

Following the 2008 Global Financial Crisis, Spain offered financial incentives (plus wage subsidies) and re-employment programs through the government to workers in hospitality. This was accompanied by EU-supported vocational education programs that allowed workers to 'bridge the gap' into higher-skilled year-round tourism occupations (Ioannides & Gyimóthy,

2019). The Caribbean region has also trialed several certification programs and inter-regional mobility of workers that focused on improving the quality of workers in the industry and reducing informal employment—particularly in disaster-affected destinations like Dominica and the Bahamas (Jayawardena, 2020).

The cases provide lessons in combining social protection mechanisms with skills development and facilitated policy collaboration. The cases demonstrate the need for multi-sectoral recovery plans that involve not just economic but also social and educational elements. Without a social and educational component, temporary relief often fails to translate into longer-term resilience or improvements in the quality of the formal workforce.

Summary of Literature Gaps and Strategic Rationale

The literature highlights that informality, skill mismatches, and inadequate labor protections are consistently the primary vulnerabilities in tourism labor markets — a phenomenon that is also evident in Bali. National strategies for tourism development in Indonesia have prioritized promoting infrastructure and marketing destinations; however, workforce development and labor rights have been less of a focus (World Bank, 2021). Moreover, while there are a few policy briefs to formalize the sector, the working conditions and labor access to training for informal and seasonal workers have been little discussed.

The review highlighted missed opportunities related to Bali's plans to recover tourism after the COVID-19 pandemic. Unlike Thailand or Spain, there has not been any large-scale, coordinated upskilling and reemployment of displaced tourism professionals. Furthermore, the reliance on international tourists has made local workers incredibly vulnerable to global disruptions; however, there has been little investment in preparing workers to transition into more diversified or sustainable roles, such as digital services or ecotourism (Baum, 2020; UNWTO, 2021).

This disconnect between what we know as scholars and the policy response is the perfect rationale for this document. We need to develop a realistic and evidence-based workforce recovery plan that is inclusive, built within established policy frameworks, and informed by lessons learned from largely successful international models. We can ultimately rebuild Bali's tourism workforce faster, better, and more consistently.

Methodology

This report employs a **qualitative secondary research approach** to examine the labor market challenges and strategic recovery options in Bali's tourism sector following the COVID-19 crisis. The study focuses on analyzing existing academic literature, government reports, and data from international organizations to identify both the structural weaknesses and policy gaps that contributed to widespread workforce displacement.

Given the ongoing nature of the post-pandemic recovery and the absence of comprehensive primary labor market surveys in Bali, a secondary data methodology was chosen as the most appropriate for this assignment. This approach allows for the integration of diverse and credible data sources to provide a comprehensive and timely analysis of the tourism labor landscape.

Key data sources include:

- **Official statistical publications** such as *Bali in Figures 2020* from the BPS-Provinsi Bali (2020), which provide baseline economic and employment data;
- **Reports from multilateral institutions** like the International Labour Organization (ILO, 2021), the World Bank (2021), and the Asian Development Bank (ADB, 2021), which offer cross-national labor impact assessments and policy analyses;
- **Academic journal articles** from sources such as *Tourism Geographies*, *Annals of Tourism Research*, and *International Journal of Contemporary Hospitality Management*, which contribute theoretical frameworks and empirical case studies;
- **Sector-specific case studies** from comparable crisis-affected destinations (e.g., Thailand, Spain, Maldives) to contextualize Bali's labor market response and extract applicable lessons.

The report is structured around a **thematic analysis** approach, identifying patterns in labor market disruption, workforce vulnerabilities, and strategic policy responses. This allows for a critical evaluation of both Bali's specific challenges and broader global recovery models. Special attention is given to the segmentation, informality, and the role of gender and migration within the tourism labor force.

Limitations of this approach include reliance on data that may be slightly outdated or generalized across Indonesia rather than specifically for Bali. However, by triangulating findings from multiple sources and focusing on well-documented trends, the study ensures relevance and analytical depth.

This methodology supports the report's objective of developing a **strategically grounded, evidence-informed workforce recovery plan** aligned with international labor standards and ethical management practices.

Findings

Pre-Crisis Labour Market Dynamics in Bali

Prior to the COVID-19 pandemic, Bali's economy was ranked as one of Indonesia's most tourism-reliant regional economies. In 2019, Bali welcomed over 6.3 million international tourists, with visitor expenditure making up nearly 53% of its regional gross domestic product (GRDP) (BPS-Provinsi Bali, 2020). The tourism industry was the largest sector, directly employing approximately 1 million workers, which represented around 25% of the region's workforce (ILO, 2020).

Many of these jobs were in the hospitality, food and beverage, retail, transportation, and cultural tourism sectors. This stressed the high levels of informality in the informal tourism labor market. Two-thirds of tourism workers lack formal contracts or labor protections (Indonesian Ministry of Manpower, 2019). Workers in informal employment, such as freelance guides, market vendors, and seasonal hotel staff, typically have significantly lower wages and work on an ad hoc, casual, or seasonal basis, often without access to health benefits, pension plans, or labor dispute mechanisms (Bianchi, 2020).

Bali's tourism labor market was also segmented based on gender and migration. Women tended to work in low-wage, part-time jobs, such as cleaning, front office work, or food service, while rural migrants from Java and Eastern Indonesia often filled the most menial jobs with little job security (Cukier, 2002). These structural features contributed to Bali's tourism labor market being much more susceptible to sudden shocks and economic emergencies.

Labour Market Impact of the COVID-19 Crisis

The onset of the COVID-19 pandemic at the beginning of 2020, followed by the subsequent closure of international borders, led to an immediate collapse of Bali's tourism industry. By mid-2020, international arrivals had decreased by more than 99%, and over 75,000 tourism workers had been laid off, furloughed, or placed on unpaid leave (Indonesian Ministry of Tourism and Creative Economy, 2021).

Many of these workers, especially in the informal sector, did not receive any compensation or social safety nets. The ILO (2021) reported that informal tourism workers in Bali were five times more likely to experience income loss than formal workers. Additionally, due to Indonesia's fragmented unemployment insurance entitlements, most displaced workers had no access to formal re-employment programs or vocational retraining (World Bank, 2021).

In a survival strategy, thousands of former tourism workers and migrants returned to their home villages or turned to subsistence agriculture or micro-scale enterprises instead (Gede & Mahadewi, 2022). For many others, this resulted in significant skill loss, where trained hospitality workers could not utilize the training they received or had lost awareness of the latest industry information.

Wages, Skills, and Labour Supply-Demand Mismatch

The mass departure of employees from the tourism sector has created a notable labor supply-demand mismatch, as many hospitality workers either left the industry permanently or were unwilling to return due to poor job conditions and uncertainty about their pay (Baum, 2020). Many of the travel restrictions had been lifted by late 2022, leaving tourism operators with a workforce in short supply.

Previously, entry-level hospitality workers were earning an average salary of IDR 2.5–4 million per month (~USD 170–270) before the pandemic, which was often below the living wage ratio for urban areas (ILO, 2020). Many of these wages dropped or were suspended during the crisis. Without the introduction of proper wage stabilization mechanisms and a shift towards skilling, tourism businesses now have the challenge of luring back qualified staff, especially within the mid-to-high-end hotel and tour markets, who need language, customer service, and IT skills.

Structural Vulnerabilities and Labour Segmentation

The COVID-19 crisis exposed the structural vulnerabilities in Bali's tourism labor market:

Informality: The absence of contracts and formal records of workers complicated tracking and providing assistance to those displaced during the crisis (ILO, 2021).

Seasonality: The extreme seasonality of tourism caused workers to experience earnings fluctuations without discrete interruptions, which exacerbated hardship during downturns and lockdowns.

Skills erosion: Workers eroded their skills as they were unemployed for extended periods, resulting in changes in skills and leading to forced migration to other sectors with different skill requirements.

Coordination failures: Gaps between labor market planning and tourism policies limited a coordinated response to the workforce disruption.

While the recovery of tourism in Bali is underway, these vulnerabilities remain, hindering the pace and quality of the labor market's restoration. The absence of labor market-targeted retraining programs, social protections, or formalization of workers puts tourism labor at serious risk of future disruptions.

Discussion

The COVID-19 pandemic has highlighted profound weaknesses in the labor market for tourism in Bali. The research revealed high levels of informality in employment, poor organizational structure, inadequate social protection, and a significant loss of skills. The recovery plan must address these weaknesses with immediate measures and long-term reforms to the tourism workforce, making it more resilient, equitable, and future-proof.

Short-Term Recovery Strategies

Wage Stabilization and Emergency Support

After the crisis, one of the most pressing needs was stabilizing the income of displaced workers. Temporary wage subsidies, such as those employed in Thailand and Malaysia, could have enabled employers to keep people on payroll during lockdowns and provided a degree of basic security to informal workers (ILO, 2021). In the context of Bali, this meant providing temporary wage support to workers in the tourism sector, ideally tied to reemployment where possible, through digital platforms and mobile banking, particularly to workers without formal contracts (World Bank, 2021).

Additionally, Bali could have benefited from a localized Tourism Relief Employment Program, in which impacted workers were hired on a temporary basis. Projects involving public tourism infrastructure (e.g., maintenance of heritage sites, beach cleanups, eco-tourism trails) would

allow workers to receive income while maintaining community tourism assets and preventing the total displacement of labor.

Safe Reopening and Flexible Rehiring

With the return of international visitors, short-term strategies should focus on a safe and efficient reopening. The UNWTO and ILO have outlined protocols for employers to follow. Among their recommendations are training staff on COVID-19, guest relations, and workplace hygiene (UNWTO, 2021). Employers should be encouraged to recall laid-off employees using financial incentives, such as reentry bonuses, tax rebates, and micro-loans, to small businesses that agree to abide by fair rehire practices.

Long-Term Workforce Planning

Upskilling and Investment in Human Capital

The pandemic highlighted a pressing need for structured, easily accessible, industry-aligned training for displaced workers, as many of these individuals lacked transferable skills that hindered their ability to transition into new work sectors and industries. In response, Bali should implement a Tourism Skills Accelerator Program similar to Thailand's recent e-learning (Tourism Authority of Thailand, 2021) for displaced workers and the unemployed following the pandemic crisis.

The Tourism Skills Accelerator Program should have a curriculum that includes foreign language skills, sustainable tourism and environmental awareness, digital service delivery (i.e., online booking systems, remote guest services), and relevant soft skills topics such as effective communication and conflict resolution.

Vocational training must be modular and flexible, localized, and developed in collaboration with hospitality association partners, universities, and community centers.

Formalization of Informal Labour

More than 60% of Bali's tourism workforce is informal and was also the most affected during the crisis (ILO, 2020); therefore, formalizing tourism employment should be an important long-term priority and plan. Some ways to do this could include:

Instituting employment contracts for all registered tourism businesses

Tying government incentives (subsidies, tax reductions, etc.) to formal hiring

Setting up simple pathways for accessing legal forms of work for small firms and freelancers

Formalization needs to be backed by awareness programs and administrative simplifications, which will prevent micro-enterprises from being deterred.

Labour Policy Innovation and Mobility

Labour Mobility and Sector Integration

Recovery initiatives must support labor flexibility across sectors. Many tourism workers transitioned, for example, into agriculture and construction during the pandemic. These transitions were informal and unregulated, resulting in underemployment and a mismatch of skills (Gede & Mahadewi, 2022).

The government should design an Integrated Labour Mobility Framework that would enable tourism workers to:

Gross their labor into other sectors temporarily (e.g., during off-seasons or crises);

Continue upskilling and maintain some level of certification across sectors;

Return to tourism with help (recognition of learned skills or retraining).

This model would be particularly relevant for women and rural workers with irregular employment patterns.

Digital Workforce Platforms

Bali's recovery plan can be bolstered through digitalization. Mobile-based workforce programs, such as India's e-SHRAM and Indonesia's "Kartu Prakerja," can support the registration of

informal workers, match job seekers with employers, and monitor workforce data (World Bank, 2021). These programs can also offer training and digital certification modules to strengthen longer-term employability.

Resilience, Ethics, and Stakeholder Collaboration

Social Protection and Ethical Employment in Tourism

One of the lessons imparted by the pandemic is the need for inclusive and ethical employment procedures in tourism. Workers must secure access to:

- Basic health and accident insurance
- Paid sick leave, paid maternity leave
- Unemployment support in crises

Indonesia's broader national social insurance framework (BPJS) can be adapted and applied to seasonal and informal tourism workers, which are voluntary, low-cost measures, especially for micro-entrepreneurs (ADB, 2021).

Tourism recovery in Bali should continue to be informed by ethical labor practices, according to:

- ILO Convention No. 172 (Working Conditions in Hotels and Restaurants)
- UNWTO Global Code of Ethics for Tourism
- Decent Work Agenda (ILO, 2020)

Monitoring processes, such as community-based watchdog groups or third-party certification, can oversee compliance by tourism employers.

Public–Private Partnerships (PPP)

Coordinating sustainable workforce recovery cannot happen in isolation from government, private employers, educational institutions, and international partners. For example:

Training partnerships from tourism schools and hotels

Re-employment agreements mean employers commit to re-hire trained workers

Collaboration between local tourism boards and community organizations to formalize informal jobs

PPP models have been effectively applied in the Caribbean post-hurricane recovery and can serve as a reference for Bali (Jayawardena et al., 2020).

Conclusion

The COVID-19 pandemic has brought about a crisis unprecedented in Bali's tourism sector, characterized by extreme levels of unemployment, job insecurity, and loss of skills among the workforce. Tourism accounts for over half of Bali's regional GDP, and when global travel came to a halt, the industry soon suffered from structural vulnerabilities in the labor market, particularly the reliance on informal work and seasonal jobs without social protections.

This report has examined the pre- and post-landscape in Bali's tourism labor market to highlight the systemic weaknesses that left thousands of workers unprotected and prevented recovery efforts from being sustained. Informal workers were most at risk during the collapse of the tourism sector; women workers and migrants from lower socioeconomic backgrounds would suffer economically more than many other tourism workers, with limited options for compensation, retraining, or reemployment services. Similarly, the post-crisis recovery revealed a considerable labor mismatch, with a substantial number of displaced workers failing to return to the tourism industry due to unfavorable conditions, a lack of benefits, and inadequate means to upgrade their skills.

The urgency of response required the report to outline a tiered strategic recovery plan. In the short term, this would involve various interventions, including wage subsidies, temporary public employment schemes, and safe reopening protocols, to stabilize the income effect and reduce long-term unemployment. In the longer term, the sustainable recovery of the tourism workforce for Bali relies on formalizing its workforce, facilitating inclusive systems of vocational education, establishing frameworks for mobility between sectors, and implementing ethical (aligned with international labor standards) human resources capabilities. Such efforts need to

cascade through diverse public-private collaboration, digital innovation, and government regulatory character not simply as separate entities.

Rebuilding a viable labor force in tourism in Bali will rely on steps that are more structural than a mere injection of economic stimulus: establishing work systems for employment, labor systems for resilience, and work systems for the future. The review and critique of Bali's tourism contexts, in combination with similar destination principles and the principles discussed in international frameworks like the ILO's Decent Work Agenda and the UNWTO's ethical codes of conduct, can allow Bali to recover from the crisis with not just a viable tourism industry, but equality in the labor market, sustainability in employment systems, and resiliency in the workforce. This report serves as a blueprint for a transitional and transformation process, as thematic issues arose for the strategic investment not just in services and productive capital but also in human capital, consequently providing infrastructure for a dignified and secure workforce in tourism.

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