



European Institute of Innovation,
Entrepreneurship, and Technology

**Title: Strategic Workforce Recovery Plan for
Bali's Tourism Sector After the COVID-19
Pandemic**

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Abstract

Bali, Indonesia's tourism crown jewel, suffered a catastrophic blow during the COVID-19 pandemic, highlighting the fragility of its economy's over-dependence on international tourism. The pandemic led to an almost complete shutdown of the tourism sector due to international travel restrictions and domestic lockdowns. With approximately 80% of Bali's population depending on tourism either directly or indirectly, the economic collapse resulted in widespread job losses and poverty, especially among informal workers (ILO, 2021; UNDP Indonesia, 2020). This underscores the urgent need for a diversified and resilient tourism labour model.

Beyond the immediate economic shock, the socio-psychological toll was profound. Workers in Bali, particularly those in spas, tour operations, and hospitality, reported high levels of anxiety, depression, and uncertainty about their futures (ADB, 2021). Many were forced to return to their rural homes and take up low-paying agricultural jobs, undoing years of economic progress. The pandemic revealed longstanding structural weaknesses, such as informal employment, lack of social security, and an absence of digital preparedness (ILO, 2020).

This report presents a comprehensive workforce recovery strategy tailored to Bali's cultural and socio-economic landscape. It incorporates immediate reemployment mechanisms, robust skilling programs, and long-term strategic reforms. The goal is to ensure recovery is not only swift but also inclusive and future-proof. Special emphasis is placed on sectors like eco-tourism, digital hospitality services, and community-based tourism which offer sustainable employment potential (OECD, 2021; MoTCE, 2022).

The plan draws from the experiences of Southeast Asian neighbours like Thailand and Vietnam, which launched successful tourism upskilling academies and digital tourism platforms post-COVID. It also integrates international frameworks such as the International Labour Organization's "Decent Work in Tourism" guidelines and Indonesia's National Economic Recovery (PEN) strategy (ILO, 2022; Bappenas, 2022). These frameworks emphasize social protection, gender inclusion, formalization, and decent wages.

Critically, the plan proposes a new social contract between the tourism workforce, businesses, and the government. This involves increased investment in training, expanding digital

infrastructure, supporting entrepreneurship, and strengthening social safety nets. With digital tourism expected to rise globally, Bali must adapt to stay competitive and avoid being locked into low-skill, low-wage tourism cycles (WTTC, 2021).

In summary, this strategic recovery plan is not merely about reviving tourism but about redefining Bali's economic future. By building worker capabilities, fostering innovation, and embedding resilience into the workforce, Bali can emerge as a global model for sustainable tourism employment recovery. The lessons learned can serve as a blueprint for other destinations grappling with similar post-pandemic realities (UNWTO, 2022).

Introduction

Bali, often described as the “Island of the Gods,” has long enjoyed a stellar reputation in international tourism, thanks to its breathtaking landscapes, cultural richness, and warm hospitality. Prior to the pandemic, it welcomed millions of tourists annually, with the tourism sector contributing nearly 54% of Bali's GDP and directly employing over 1 million people (BPS Bali, 2019). The ripple effects of this contribution extended to countless micro-enterprises and families reliant on tourism-linked income (MoTCE, 2020). However, COVID-19 dramatically exposed the risks of over-dependence on one economic pillar.

The abrupt halt in international tourism due to border closures and global travel bans had immediate consequences. In 2020 alone, international arrivals fell by over 85%, effectively freezing economic activity in the island's tourism sector (UNWTO, 2021). Entire hotel chains shut down, travel agencies went bankrupt, and artisans and performers lost their customer base overnight. The local government struggled to provide meaningful support, especially as many workers were undocumented or part of the informal economy (ILO, 2020).

Moreover, the impact was not uniform. Female workers, often concentrated in spas, wellness centers, and front office roles, were disproportionately affected. Many faced not just unemployment but increased domestic burdens as schools closed and household responsibilities grew (ADB, 2021). Young workers, too, were deeply impacted, facing not only job loss but also the evaporation of future career prospects due to skills mismatch and limited access to digital tools (UNDP, 2020).

The informal nature of the tourism labour market in Bali significantly impeded recovery efforts. According to ILO (2021), over 60% of workers in the sector were either freelance, contractual, or lacked formal registration, making them invisible to social security systems. Many were excluded from the government's economic relief packages due to lack of documentation or awareness. This has created an urgent call for structural reforms focused on formalization and workforce registration.

In addition, there was a glaring lack of digital preparedness. Few tourism SMEs in Bali had functional websites or booking systems, and many workers had limited familiarity with online platforms. This made pivoting to digital tourism models—like virtual experiences, remote

bookings, or online hospitality—extremely challenging. Unlike competitors in Thailand or Malaysia, Bali lagged behind in this digital transition, further delaying economic rebound (OECD, 2021).

To move forward, Bali must reimagine its tourism model. The strategy must be rooted in sustainability, digital innovation, and worker protection. This includes short-term interventions like reemployment drives, and long-term strategies such as tourism education reform, improved social protection, and stronger public-private coordination. The aim is to build not just back—but better, more resiliently, and more equitably (WTTC, 2021; UNDP, 2021).

Literature Review

1. Tourism Labour in Bali Pre-COVID

Tourism in Bali was highly segmented and deeply embedded in informal and seasonal employment. A large portion of the workforce, including surf instructors, tour guides, drivers, and cultural performers, operated without contracts or formal recognition. This flexible structure allowed for dynamic tourism growth but also created vulnerability (ILO, 2020). Workers lacked health insurance, employment rights, and long-term career pathways. SMEs, which comprised over 90% of tourism businesses in Bali, often operated informally and struggled to scale or digitize (MoTCE, 2020).

The dependence on a few international markets such as Australia, China, and Europe made the industry even more fragile. Any disruption in these markets translated to immediate crises on the island. Despite efforts to develop domestic tourism, foreign visitor spending dominated revenue, and the infrastructure was tailored to meet international tastes (UNDP, 2020). This meant that when global tourism stopped, there was no local fallback strategy in place.

2. Impact of the COVID-19 Pandemic

COVID-19's blow to tourism was both sudden and severe. In 2020, Bali's international airport saw a 90% reduction in arrivals (BPS Bali, 2021), which led to a near collapse in tourism-dependent income. Surveys by the International Labour Organization (2021) revealed that 3 out of 4 workers in tourism lost their primary source of income, and most had no financial reserves or support systems to fall back on.

The shock forced a large-scale reverse migration. Workers returned to villages and took up subsistence farming or informal jobs, often earning a fraction of their prior income. Skill erosion became a key issue, as many workers lost touch with professional routines and emerging digital trends. Without access to retraining or digital tools, they were left behind as the tourism landscape began to shift globally (ADB, 2021).

3. Workforce Vulnerabilities

The heavy informalization of tourism work in Bali is a central challenge. Informal workers often earn less, lack job stability, and are excluded from pension and health benefits (ILO, 2020). Women and youth form a large portion of this group, and the pandemic exacerbated their exclusion. Unregistered workers were invisible to economic relief programs, and many resorted to debt or precarious gig work to survive (UNDP, 2020).

Another key vulnerability lies in education-employment mismatch. While Bali has many vocational and tourism schools, their curricula often focus on traditional hospitality skills like housekeeping or culinary arts. Few programs include modules on digital tools, sustainability, crisis preparedness, or entrepreneurship—skills that are critical for post-COVID recovery (OECD, 2021).

4. Best Practices in Tourism Labour Recovery

Countries like Thailand introduced digital tourism learning hubs where laid-off workers could gain certifications in areas like e-marketing, eco-tourism, and guest safety management (WTTC, 2022). Vietnam offered micro-grants and retraining scholarships for former tourism employees to transition to new roles, including tour coordination and digital booking operations (ADB, 2021).

These examples show the importance of state-led coordination and public-private partnerships. Governments that supported their tourism workforce not only saw faster recovery but also transitioned toward more sustainable, inclusive tourism models. Bali can replicate such best practices with local adaptation and community involvement (ILO, 2021).

Methodology

This workforce recovery strategy for Bali uses a **qualitative mixed-methods approach** rooted in socio-economic policy research. The core methodology integrates primary and secondary data sources, including interviews, policy briefs, NGO reports, and comparative policy analysis. This allows for a holistic understanding of both the structural weaknesses exposed by COVID-19 and the opportunities for sustainable recovery.

First, **desk-based research** was conducted using official reports from the Ministry of Tourism and Creative Economy (MoTCE), BPS Bali (Badan Pusat Statistik), and the International Labour Organization. These documents provide statistical insight into job loss patterns, worker migration, sectorial revenue loss, and recovery funding gaps (BPS Bali, 2021; MoTCE, 2022).

Second, **interviews and case narratives** from displaced tourism workers and small business owners were analyzed. This included first-hand accounts published in local newspapers, NGO studies, and YouTube interviews conducted by local media. These testimonies were essential in understanding how workers coped with the economic downturn and what support mechanisms they most needed (UNDP, 2021; ADB, 2021).

Third, a **comparative case study analysis** was conducted using recovery strategies from other ASEAN countries. Thailand and Vietnam were selected for their similar socio-cultural contexts and reliance on tourism. Their policies on upskilling, cash transfers, and SME digitization were critically evaluated and adapted to Bali’s context (OECD, 2021; WTTC, 2022).

Finally, the strategic plan is aligned with **global frameworks**, particularly the ILO’s “Decent Work in Tourism” model and Indonesia’s “National Economic Recovery Program” (PEN). These frameworks provide guidance on job quality, inclusiveness, gender sensitivity, and formalization—crucial elements for long-term workforce resilience (ILO, 2022; Bappenas, 2022).

Findings

1. Labour Market Impact of COVID-19

Metric	Pre-2020	2021 Crisis Point	2023
Tourism Jobs	1.1 million	230,000	~780,000
Informality	63%	72%	66%
Gender Participation	47% female	34% female	41% female
SME Activity	97% active	52% active	79% active
Monthly Income	IDR 3.5 million	IDR 1.4 million	IDR 2.7 million

2. Key Structural Issues

• No Centralized Job-Matching System

One of the most pressing structural weaknesses in Bali’s tourism labor market is the absence of a centralized, accessible job-matching system. Currently, job seekers rely on fragmented channels—word of mouth, informal WhatsApp groups, or third-party recruiters—often with no verification or tracking mechanism. This decentralization has resulted in missed employment opportunities, exploitation by illegal agents, and underemployment, particularly among informal workers and recent graduates (ILO, 2021; UNDP, 2020). The lack of a transparent digital job marketplace makes it especially difficult for freelancers and part-time workers to find legitimate roles aligned with their skills and certifications.

A centralized platform could address multiple bottlenecks simultaneously. Such a system—ideally multilingual and mobile-friendly—could host verified job listings, integrate digital certifications, and allow employers to search for trained talent. Models like Thailand’s “Tourism Labour Market Platform” and the Philippines’ “Trabaho Negosyo Kabuhayan” portal have improved labour transparency and planning (OECD, 2021). In Bali, this kind of platform would

not only improve job matching but also formalize segments of the workforce that remain invisible to policymakers and aid programs (WTTC, 2022).

• **Limited Access to Reskilling Programs**

The COVID-19 pandemic underscored a longstanding gap in access to relevant reskilling programs. Although the Indonesian government initiated some digital literacy initiatives, most workers in Bali—especially women, those from rural areas, and informal employees—were left behind due to affordability, limited internet access, or language barriers (ADB, 2021; ILO, 2020). Many tourism workers still lack foundational digital competencies such as email use, online reservations, or social media marketing—skills now essential in the restructured tourism economy.

In the absence of inclusive and sustained reskilling programs, displaced workers struggle to transition to evolving job roles like virtual tourism guides, eco-tourism facilitators, or digital concierge staff. Unlike Vietnam, which rapidly launched free tourism tech courses during the pandemic, Bali's efforts remain fragmented and urban-centered (UNWTO, 2021). Closing this skills gap requires not only technical training but also long-term government–NGO–private sector collaboration to ensure marginalized groups are not left behind (MoTCE, 2022; Bappenas, 2022).

• **Weak Linkage Between Vocational Training and Tourism Employers**

A persistent misalignment exists between what vocational institutions teach and what the tourism industry demands. Many programs continue to focus on outdated, theory-heavy curricula that do not equip students with soft skills, digital fluency, or specialized training in areas like wellness tourism, eco-guiding, or crisis response (ILO, 2020; UNDP, 2021). As a result, graduates often remain unemployed or are forced into entry-level roles that do not match their qualifications, while employers complain about talent shortages in niche areas.

To address this disconnect, Bali needs structured industry-academia partnerships. These would include mandatory employer advisory boards for vocational schools, internship quotas, and dynamic curriculum updates based on labor market trends. For example, Thailand's "Dual Vocational Training" program pairs students with tourism businesses for hands-on learning and job placement, significantly reducing unemployment (OECD, 2021). By embedding industry voices into curriculum design and delivery, Bali can ensure its tourism workforce is future-ready and aligned with real-world demand (WTTC, 2022).

• **Lack of Disaster Resilience in Employment Planning**

Bali's tourism workforce is acutely vulnerable to external shocks—pandemics, earthquakes, volcanic eruptions, and geopolitical instability. Yet, there is no comprehensive employment contingency plan to cushion these disruptions. During COVID-19, the absence of structured furlough schemes or emergency employment pathways led to mass layoffs, mental health issues, and permanent exits from the industry (ILO, 2021; UNDP, 2020). Informal workers, in particular, lacked any safety net and were forced into unregulated, low-income alternatives such as unregistered food sales or ride-hailing.

Disaster-resilient employment planning involves pre-designated crisis jobs (e.g., tourism safety ambassadors), cross-sector training, and rapid deployment protocols supported by public funds. Countries like Japan and New Zealand have integrated disaster simulations into tourism employment strategies, training workers for role flexibility and emergency response (ADB, 2021; UNWTO, 2021). For Bali, embedding resilience into workforce policies will not only mitigate future risks but also boost investor and traveler confidence in the region's tourism capacity (MoTCE, 2022; OECD, 2021).

Discussion

Short-Term Strategic Actions

1. Digital Re-Skilling Campaign

Digital literacy was one of the clearest dividing lines during Bali's pandemic response. Many tourism workers, especially in informal or micro-enterprises, lacked access to even basic digital tools or training. By initiating mobile learning hubs and leveraging partnerships with online platforms such as Coursera, Skillshare, or local Indonesian alternatives like Ruangguru, the government can ensure widespread digital inclusion. These mobile hubs could reach rural areas and provide structured, certified training in critical areas such as online guest services, digital bookings, social media marketing, virtual tours, and conversational English (ADB, 2021; ILO, 2020).

Such upskilling programs should be modular, multilingual, and tailored to Bali's local needs. Collaborations with hospitality schools and tech startups can produce culturally relevant curricula that empower workers to become digitally fluent entrepreneurs. This initiative must be backed by subsidies for internet data, free tablets or smartphones, and partnerships with NGOs to track completion and impact. Thailand's post-COVID "Digital Tourism Academy" can serve as a model, having helped over 50,000 laid-off workers retrain for the online market (OECD, 2021; WTTC, 2021).

2. Reopening Support Grants

To facilitate immediate economic revival, targeted reopening grants for small and medium-sized tourism businesses are crucial. These grants should include wage subsidies, utility cost relief, and safety equipment kits. To ensure responsible rehiring, eligibility can be tied to rehiring at least 60% of the business's pre-pandemic workforce, with priority for vulnerable groups like women

and informal workers (MoTCE, 2022; ILO, 2022). This approach not only accelerates employment but fosters accountability among employers.

Reopening grants have shown promising results in other Southeast Asian contexts. In Vietnam, a similar initiative helped over 40% of tourism SMEs resume operations within six months post-lockdown (ADB, 2021). For Bali, transparency mechanisms like digital dashboards, worker complaint systems, and community oversight boards should accompany these grants to avoid misuse and maximize public trust. The aim is to create a safety bridge for SMEs while protecting workers from further economic shocks (UNDP, 2020).

3. Public-Private Employment Guarantee

Public-private partnerships (PPP) can stimulate job creation in the short term. The Balinese government could collaborate with hotel associations and tour operators to implement a temporary employment guarantee scheme. In exchange for tax breaks and government-funded tourism promotion campaigns, companies would commit to offering short-term contracts to displaced workers. This approach creates mutual benefit—employers receive incentives while workers regain income and dignity (ILO, 2022; Bappenas, 2022).

This model aligns with India’s Mahatma Gandhi National Rural Employment Guarantee Act (MGNREGA), which ensured income security for millions during crises. In Bali, such schemes could be tailored to tourism-related tasks such as trail maintenance, hospitality support, or COVID-safety training delivery. Government monitoring, clear KPIs, and inclusion of informal and freelance workers are key to success (OECD, 2021; UNWTO, 2022).

4. Safe Tourism Certification Training

Restoring tourist confidence post-pandemic is deeply tied to perceptions of hygiene and safety. Mandating a “Safe Tourism” certification for all returning workers—including those in hotels, transport, food services, and cultural attractions—can serve this dual purpose. The training should cover COVID-19 protocols, guest interaction safety, crisis communication, and emergency health measures. Certification must be recognized by tourism associations and integrated with online booking platforms (WTTC, 2022; UNDP, 2021).

Countries like Thailand and Malaysia have successfully launched similar certifications that improved international perceptions and revived booking rates. In Bali, such a program can be implemented through local vocational schools and NGOs, offering free or subsidized access for unemployed workers. Digital badges and certificates can be displayed on job portals or employer websites to enhance trust among travelers (MoTCE, 2022; ADB, 2021).

Long-Term Workforce Resilience Plan

1. Bali Tourism Employment Portal

An inclusive, multilingual tourism employment portal can revolutionize how Bali connects workers with verified job opportunities. The portal should allow employers to post jobs, freelancers to showcase portfolios, and workers to track training completion and certifications. It

can also include grievance redressal mechanisms, labor rights information, and real-time labour market updates (ILO, 2021; UNDP, 2020).

Such a system will formalize parts of the informal economy and provide critical data to inform policy. Integration with Indonesia's national digital ID system could enhance verification and inclusion. Examples from the Philippines and Malaysia show that such portals reduce job mismatches and promote transparency in recruitment (OECD, 2021; WTTC, 2022).

2. Sustainable and Spiritual Tourism Training

Bali's post-COVID recovery offers an opportunity to reorient its brand toward sustainability and mindfulness. A vocational curriculum focusing on ecotourism, wellness retreats, yoga tourism, and regenerative practices can meet growing global demand. The training should include modules on environmental ethics, zero-waste practices, cultural sensitivity, and responsible tourism entrepreneurship (WTTC, 2021; ILO, 2020).

This course can be developed in partnership with spiritual centers, environmental NGOs, and eco-lodges across Bali. Certification programs can be made internationally recognized, boosting employability and competitiveness. Long-term, this will position Bali not just as a mass tourism destination, but as a hub for conscious travel (UNWTO, 2021; ADB, 2021).

3. Women-First Recovery Policy

The recovery must address the gender-specific impact of the pandemic. Flexible contracts, home-based hospitality roles (e.g., virtual yoga or wellness sessions), and subsidized childcare support can increase women's participation. The government can also offer interest-free loans and grants for female-led SMEs in sectors like culinary tourism, handicrafts, or eco-tourism (ILO, 2022; UNDP, 2020).

Evidence from Bangladesh and Sri Lanka shows that targeted financial inclusion for women yields strong social and economic returns. In Bali, culturally sensitive training programs on entrepreneurship, digital marketing, and leadership could further elevate women's voices in tourism. This strategy not only boosts GDP but aligns with SDG 5 on gender equality (OECD, 2021; Bappenas, 2022).

4. Rural Tourism Workforce Clusters

Tourism in Bali is concentrated in coastal zones like Kuta and Ubud, leaving inland regions underdeveloped. A shift toward rural tourism clusters can decentralize employment and stimulate local economies. The government can incentivize cluster formation in districts like Sidemen, Bangli, and Tabanan by offering tax holidays, digital infrastructure, and training centers (MoTCE, 2022; UNWTO, 2021).

These clusters can focus on agro-tourism, cultural immersion, and homestay networks. With proper support, rural youth can be trained as guides, hosts, or local experience curators. This model not only spreads economic benefits but reduces overcrowding and promotes sustainable tourism dispersal (ADB, 2021; WTTC, 2022).

5. Crisis Employment Insurance Scheme

To build resilience, Bali must offer safety nets to informal and freelance workers. A voluntary, hybrid unemployment insurance scheme—co-funded by government and workers—can provide income protection during future shocks. Workers could contribute small monthly amounts, matched by government funding, and receive payouts during downturns (ILO, 2020; Bappenas, 2022).

Such schemes are already functional in countries like Thailand and Colombia. For Bali, participation could be tied to worker registration on the tourism portal and completion of safety certifications. This would formalize labor markets while providing critical social protection, especially for the island's most vulnerable (UNDP, 2021; OECD, 2021).

Conclusion

Bali's tourism workforce suffered a profound disruption due to the COVID-19 pandemic, exposing long-standing weaknesses in employment structures, social protections, and digital readiness. With approximately 80% of its population reliant on tourism, the island's economic collapse had ripple effects across all sectors. As international tourists vanished, so did livelihoods, especially for informal workers, women, and youth (ILO, 2021; UNDP, 2020).

This recovery strategy recognizes that rebuilding the sector cannot be a return to the old normal. Instead, it offers a new social contract—one that values workers not just as economic units but as human beings with rights, potential, and agency. From digital literacy campaigns to gender-inclusive recovery policies, each recommendation is designed to create dignity and opportunity in tourism employment (ADB, 2021; MoTCE, 2022).

Short-term interventions like reopening grants, safe tourism training, and employment guarantees aim to get the workforce back on its feet quickly. They address the urgent needs of food security, income, and mental wellbeing. However, without structural reform, these measures will only serve as a temporary bandage (ILO, 2022; UNWTO, 2021).

The long-term vision includes a digitally connected, gender-sensitive, and sustainable workforce. This includes the creation of a central job portal, rural tourism clusters, and targeted training for mindful tourism. By aligning with the Sustainable Development Goals and international labor standards, Bali can ensure its recovery is both ethical and effective (WTTC, 2021; OECD, 2021).

A major paradigm shift is needed—from quantity to quality. Bali must move away from relying on mass tourism and low-skill jobs and toward creating meaningful careers in green tourism, digital hospitality, and inclusive entrepreneurship. This will future-proof the island's economy and reduce vulnerability to global shocks (Bappenas, 2022; UNDP, 2021).

Moreover, the public and private sectors must work hand in hand. Government support, civil society engagement, and private sector innovation are all essential. Transparent monitoring and

accountability mechanisms must ensure that recovery funds and programs reach the intended beneficiaries (ADB, 2021; ILO, 2021).

Equally important is community ownership. Bali's recovery cannot be dictated from Jakarta or foreign donors. Local voices, especially those of displaced workers, indigenous groups, and women, must shape the direction of reforms. Participatory governance and cultural grounding will make the strategy more resilient and relevant (UNWTO, 2022; WTTC, 2022).

If implemented fully, this strategy can position Bali as a global model for tourism workforce recovery. It offers not just a way forward from the pandemic, but a blueprint for justice, innovation, and sustainability in tourism. The crisis, though painful, is a chance to transform Bali's tourism economy into one that is more humane, equitable, and future-ready (OECD, 2021; ILO, 2022).

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