

Hajj and Umrah from the perspective of Islamic Sharia: Fiqh provisions and contemporary issues

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ABSTRACT

Hajj and Umrah were examined as forms of Islamic worship in which legal, spiritual, social, and contemporary institutional dimensions intersected. This study investigated their legal foundations, conditions of obligation, pillars, essential duties, procedures, and selected contemporary issues from an Islamic jurisprudential perspective. A qualitative library-research design with descriptive, analytical, and comparative approaches was employed. The analysis drew on the Qur'an, hadith, authoritative fiqh works, official pilgrimage guidance, Indonesian regulations, and traceable peer-reviewed studies, particularly recent literature on pilgrimage management and health-related istitha'ah. The findings showed that the obligation of Hajj for Muslims possessing istitha'ah was established by consensus, whereas the legal status of Umrah remained subject to recognized juristic disagreement. Contemporary issues involving proxy Hajj, women's travel without a mahram, health eligibility, and pilgrimage governance required an integration of classical legal reasoning, considerations of safety and welfare, and modern institutional evidence. The study demonstrated that combining doctrinal fiqh, cross-madhab comparison, and verifiable contemporary sources produced a more precise and context-sensitive account of Hajj and Umrah.

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INTRODUCTION

Hajj and Umrah are among the most important forms of worship in Islam. Hajj constitutes the fifth pillar of Islam and becomes obligatory once in a lifetime for every Muslim who meets the requirement of *istitha'ah*, or genuine ability to perform it. In classical jurisprudence, ability is not restricted to possession of travel expenses; it is connected to bodily capacity, financial sufficiency, security of travel, and the absence of circumstances that make the journey legally or practically impossible. Umrah, by contrast, shares several ritual elements with Hajj but is not bound to the same season. Its legal status is also the subject of a well-established disagreement among jurists, which makes it methodologically inaccurate to present a single opinion as though it were unanimously accepted (Al-Zuhaili, 2005; Mughniyah, 2011).

Historically, the rites of pilgrimage are linked to the Abrahamic tradition and to the Ka'bah as the central sanctuary of Islamic worship. Islamic tradition associates the rebuilding of the Ka'bah with Prophet Ibrahim and Prophet Ismail, while the Prophet Muhammad's Farewell Pilgrimage provided the normative model for the performance of Hajj. The ritual sequence therefore combines acts of worship with historical memory: *ihram* marks entry into a sacred state, *tawaf* centers worship on the House of God, *sa'i* recalls the perseverance of Hajar, standing at Arafah constitutes the central rite of Hajj, and the rites at Mina embody discipline, sacrifice, remembrance, and obedience. These dimensions explain why legal accuracy and spiritual meaning should be studied together rather than separated (Qardhawi, 2005; Sabiq, 2013).

Contemporary scholarship has broadened the study of Hajj and Umrah beyond ritual law. Recent research discusses industry management, service quality, digital transformation, health preparedness, legal regulation, and the wider social and economic implications of pilgrimage. Aulia et al. (2024), for example, identify globalization, technological development, regulatory change, and competition as major factors shaping the Hajj and Umrah industry. Wulandari et al. (2023) examine Hajj and Umrah through both Islamic law and Indonesian positive law, while Indra et al. (2024)

emphasize their spiritual, social, and economic consequences. Research on mass-gathering management and health further highlights the importance of institutional preparedness, safe crowd organization, and health screening (Alifia & Deswara, 2024; Albattah et al., 2021; Basahel et al., 2021; Deswara, 2023; Susanto et al., 2024).

Despite this growing literature, three limitations remain visible. First, many discussions are predominantly descriptive and explain definitions, pillars, or procedures without sufficiently comparing juristic reasoning across *madhhabs*. Second, studies of contemporary management and health often operate separately from doctrinal *fiqh*, although concepts such as *istitha'ah*, preservation of life, hardship, and legal facilitation directly connect these fields. Third, references in popular or educational discussions of Hajj and Umrah are frequently incomplete, difficult to trace, or not synchronized between in-text citations and the bibliography. These weaknesses reduce analytical depth and make verification difficult in an academic publishing context.

The present study addresses these limitations through an integrative framework. Its novelty does not lie in proposing new ritual rules, but in bringing together four elements that are often treated separately: the normative foundations of Hajj and Umrah, comparative *fiqh*, contemporary problems of pilgrimage, and verifiable scholarly and official sources. The article therefore treats classical jurisprudence as the doctrinal foundation while using recent peer-reviewed studies and official guidance to examine how the concepts operate under modern conditions. This approach is particularly relevant to Indonesia, where the scale of pilgrimage, health requirements, institutional organization, and statutory regulation create a complex interface between religious norms and public administration.

Accordingly, this study aims to: (1) explain the legal foundations of Hajj and Umrah in the Qur'an, hadith, and *fiqh*; (2) analyze their conditions, pillars, essential duties, and principal procedures; (3) compare major juristic positions where relevant, especially concerning the status of Umrah and selected pilgrimage obligations; (4) examine contemporary issues including proxy Hajj, women traveling without a *mahram*, *health-related istitha'ah*, and modern governance; and (5) identify the spiritual, social, historical, and economic meanings of pilgrimage. The intended contribution is a coherent academic account that is doctrinally grounded, analytically comparative, and transparent in its use of sources.

RESEARCH METHOD

This study employs qualitative library research. The analytical orientation is descriptive, analytical, and comparative. The descriptive component identifies the principal legal rules and ritual structure of Hajj and Umrah; the analytical component examines the reasoning and implications of those rules; and the comparative component highlights recognized differences among juristic schools without collapsing them into a single position. Because the research is literature-based, its validity depends primarily on the authority, relevance, and traceability of the sources used.

The primary source framework consists of the Qur'an, major hadith collections, and recognized works of Islamic jurisprudence. The analysis also draws on comparative *fiqh* sources, particularly *Al-Fiqh al-Islami wa Adillatuhu* by Wahbah al-Zuhaili, *Fiqh Sunnah* by Sayyid Sabiq, and *Fiqh Lima Mazhab* by Muhammad Jawad Mughniyah. These works are used to clarify legal classifications, points of agreement, and points of disagreement. Official Indonesian pilgrimage guidance is represented by the 2024 *Tuntunan Manasik Haji dan Umrah* issued by the Directorate General of Hajj and Umrah Organization, which provides an authoritative practical reference for the sequence of rites and operational guidance (Kementerian Agama Republik Indonesia, 2024).

To strengthen the contemporary analysis, priority was given to peer-reviewed and institutionally traceable literature published in recent years, particularly research on pilgrimage management, *health-related istitha'ah*, health surveillance, and the experience of Indonesian Hajj health personnel. Regulatory materials were consulted through official government legal-information portals. Citation verification was conducted by matching in-text citations with full bibliographic entries and, where available, recording journal volume, issue, page range, DOI, or official URL. Sources that could not be connected to the substantive argument were excluded from the final bibliography.

Data were collected through documentation and organized thematically into: conceptual foundations; legal status; conditions of obligation; pillars and essential duties; *ihram* restrictions; forms and procedures of Hajj; contemporary jurisprudential issues; and philosophical-social dimensions. The analytical process consisted of source classification, thematic coding, comparison of juristic positions,

contextualization with contemporary evidence, and synthesis. This study is not presented as a systematic review or meta-analysis; rather, it is a structured doctrinal and literature-based analysis designed to integrate classical Islamic jurisprudence with contemporary, verifiable scholarship.

RESULTS AND DISCUSSION

Conceptual Foundations of Hajj and Umrah

In Islamic jurisprudence, Hajj literally conveys the sense of intending or proceeding toward a significant destination. In legal terminology, it refers to intentionally visiting the Sacred House and the prescribed sacred sites in order to perform specific rites at specified times in accordance with the Sharia. This definition contains three central elements: deliberate intention, legally defined places, and legally defined acts and times. Hajj is therefore not a general pilgrimage in the ordinary sense of religious travel; it is a structured act of worship whose validity depends on particular conditions and rites (Al-Zuhaili, 2005; Sabiq, 2013).

Umrah literally means a visit. In juristic usage, it denotes entering the state of *ihram* for Umrah, performing *tawaf* around the Ka'bah, performing *sa'i* between Safa and Marwah, and completing the rite through shaving or shortening the hair. Umrah is sometimes described as al-hajj al-asghar, the minor pilgrimage, because it shares major elements with Hajj but does not include standing at Arafah and is not restricted to the days of Hajj. The difference in ritual structure is legally significant because the standing at Arafah is indispensable to Hajj and has no equivalent within Umrah (Mughniyah, 2011; Kementerian Agama Republik Indonesia, 2024).

The conceptual relationship between the two forms of worship is therefore one of partial overlap rather than identity. Both involve *ihram*, *tawaf*, *sa'i*, and *tahallul*; however, Hajj contains additional time-bound rites, including Arafah, Muzdalifah, Mina, and the stoning of the *jamarat*. This distinction also explains why the law can treat the two acts differently in relation to obligation, timing, compensation for omitted duties, and the consequences of invalidating acts.

Legal Foundations and the Juristic Status of Hajj and Umrah

The obligation of Hajj is firmly established in the Qur'an and Sunnah. Qur'an 3:97 links the duty of pilgrimage to the ability to undertake the journey, thereby establishing *istitha'ah* as a defining condition of legal responsibility. The famous hadith describing Islam as being built upon five foundations also places Hajj among the central obligations of Islam. On this basis, Muslim jurists agree that Hajj is obligatory once in a lifetime for a legally responsible Muslim who is genuinely able to perform it. The obligation concerns a specific act of worship and cannot be reduced to its moral or symbolic meanings alone.

The status of Umrah requires more careful formulation. The Qur'an commands believers to complete Hajj and Umrah for God (Qur'an 2:196), but jurists differ over whether this establishes an independent obligation of Umrah for every able Muslim. In the comparative *fiqh* literature, the Shafi'i and Hanbali traditions generally regard Umrah as obligatory once in a lifetime for those who are able, whereas the Hanafi and Maliki traditions generally classify it as a strongly recommended Sunnah rather than an individual obligation. The disagreement reflects different approaches to textual indication, hadith evidence, and legal inference (Al-Zuhaili, 2005; Mughniyah, 2011).

This juristic disagreement corrects an oversimplification frequently encountered in general discussions, namely the assertion that Umrah is simply voluntary according to all schools. Academically, the more accurate conclusion is that Hajj is unanimously obligatory for the able, while Umrah is the subject of a recognized *madhhab*-based disagreement. Presenting the disagreement explicitly is important because an article that claims a comparative method must distinguish consensus from *ikhtilaf* rather than treating one school's doctrine as universally binding.

The Prophet's Farewell Pilgrimage is also methodologically central. His instruction to learn the pilgrimage rites from his practice establishes the Sunnah as an operational explanation of Qur'anic commands. For that reason, the legal study of Hajj combines textual foundations with a transmitted ritual model. The sequence and details of worship are not constructed solely by later juristic reasoning; *fiqh* systematizes and interprets practices grounded in revelation and Prophetic precedent (Muslim, n.d.).

Conditions of Obligation and the Meaning of *Istitha'ah*

Classical jurists identify Islam, legal capacity, maturity, freedom in the historical context of slavery, and ability as core conditions associated with the obligation of Hajj. In modern application, the most analytically significant condition is *istitha'ah*. It includes sufficient financial resources for the journey and the maintenance of dependents, physical capacity to perform the rites, and reasonable security of travel. The precise juristic formulation differs across schools, but the underlying principle is that the Sharia does not impose pilgrimage on a person for whom the obligation cannot be performed without legally significant incapacity or harm (Al-Zuhaili, 2005; Sabiq, 2013).

Contemporary pilgrimage demonstrates why *istitha'ah* must not be interpreted narrowly as financial affordability. Hajj is a mass gathering involving intense mobility, heat exposure, crowd density, disrupted routines, and substantial physical exertion. Indonesian studies show that health screening and risk identification are essential components of preparedness, while mass-gathering research emphasizes heat-risk mitigation and operational prevention (Alifia & Deswara, 2024; Almuzaini et al., 2022; Deswara, 2023; Susanto et al., 2024). The experiences of Indonesian nurses reported by Sugeng et al. (2024) further illustrate the complexity of caring for pilgrims under mass-gathering conditions.

Indonesia's regulatory approach has also formalized *health-related istitha'ah*. Minister of Health Regulation No. 15 of 2016 regulates health eligibility for Hajj pilgrims and connects departure readiness to physical and mental assessment. Idris and Nurwahyuni (2024), in their analysis of the regulation, conclude that the policy has been implemented across administrative levels while still requiring refinement and simplification. Deswara (2023) similarly shows how health *istitha'ah* is operationalized through examination and eligibility assessment, while Huda and Haeba (2021) place *istitha'ah* within the broader Indonesian regulatory context. This confirms that health eligibility is not merely an administrative obstacle to religious practice; it is a mechanism for reconciling the obligation of worship with the Sharia's concern for life, safety, and realistic capacity.

From a *fiqh* perspective, the contemporary expansion of *istitha'ah* is best understood as an application rather than a replacement of classical doctrine. Financial, physical, and security capacity remain the core concepts, but modern medical knowledge provides more precise instruments for assessing whether physical capacity is genuinely present. Thus, clinical screening, chronic-disease management, mental preparedness, vaccination, and heat-risk prevention can be understood as contemporary means of determining and protecting the substantive ability required by the Sharia.

Pillars, Essential Duties, and Their Legal Consequences

A sound analysis must distinguish between pillars (*arkan*) and essential duties (*wajibat*). A pillar is an integral component without which the pilgrimage is not valid or cannot be completed as required. An omitted essential duty, by contrast, does not necessarily invalidate the entire Hajj but may require compensatory sacrifice (*dam*), depending on the specific rule and school. Failure to preserve this distinction often creates confusion in practical guidance.

Within the Shafi'i framework commonly taught to Indonesian pilgrims, the principal pillars of Hajj are *ihram* with intention, standing at Arafah, *tawaf al-ifadah*, *sa'i* between Safa and Marwah, shaving or shortening the hair, and observance of the required order in the relevant acts. The practical guidance issued in Indonesia follows this structured understanding while also explaining the obligatory and recommended elements surrounding each rite (Al-Zuhaili, 2005; Kementerian Agama Republik Indonesia, 2024).

The pillars of Umrah consist of *ihram* with intention, *tawaf*, *sa'i*, *tahallul* through shaving or shortening the hair, and proper order according to the applicable juristic formulation. Because Umrah has no standing at Arafah, the ritual is shorter and not tied to the days of Arafah, Muzdalifah, and Mina. This does not mean, however, that Umrah is legally informal; its rites are still governed by conditions of validity and the restrictions of *ihram*.

Essential duties of Hajj include matters such as beginning *ihram* from the appropriate *miqat*, spending the prescribed time at Muzdalifah and Mina according to the relevant legal rules, and stoning the *jamarat*. The exact categorization and details vary among jurists. The practical implication is that pilgrims need to understand not only what they must do but also the legal consequence of omission. This is one reason *manasik* education should distinguish clearly between pillars, obligatory acts, Sunnah practices, and matters of recommended etiquette.

Prohibitions during *Ihram*

Ihram is both a ritual state and a legal discipline. Once a pilgrim enters *ihram*, several otherwise permissible acts become restricted. General prohibitions include deliberately removing hair or nails without a recognized excuse, applying perfume after entering *ihram*, hunting land animals, contracting marriage, and engaging in sexual intercourse or its prohibited preliminaries. The restrictions are not arbitrary; they establish a temporary discipline of restraint, equality, attentiveness, and sacred conduct (Kementerian Agama Republik Indonesia, 2024).

Certain restrictions are gender-specific in classical *fiqh*. Men are prohibited from covering the head with an attached covering and from wearing garments tailored in the ordinary form around the limbs and body while in *ihram*. Women do not adopt the two-piece male *ihram* garment; rather, they remain in modest ordinary clothing but do not wear a face veil attached to the face or gloves as *ihram* garments. Detailed applications must be explained carefully because common-language expressions such as 'stitched clothing' can be misleading: the legal concern is not the existence of sewing stitches in the fabric but the form of ordinary fitted clothing prohibited for male pilgrims during *ihram*.

These rules also illustrate the importance of accurate educational language. When practical guidance is reduced to short slogans, pilgrims may misunderstand the legal category or apply unnecessary hardship to themselves. Academic discussion should therefore explain both the rule and its juristic meaning, while practical *manasik* programs should translate that explanation into clear, accessible instructions.

Forms of Hajj: *Ifrad*, *Tamattu'* and *Qiran*

Islamic jurisprudence recognizes three principal forms of Hajj: *ifrad*, *tamattu'*, and *qiran*. Hajj *ifrad* means entering *ihram* for Hajj alone. A pilgrim performing *ifrad* does not combine Umrah with the Hajj *ihram* and, on that basis, is not subject to the compensatory sacrifice associated specifically with *tamattu'* or *qiran*. Hajj *tamattu'* consists of performing Umrah during the months of Hajj, leaving the state of *ihram* after completing Umrah, and then entering a new *ihram* for Hajj in the same pilgrimage season. Hajj *qiran* combines Hajj and Umrah within a single *ihram* (Mughniyah, 2011; Kementerian Agama Republik Indonesia, 2024).

The three forms express legitimate juristic flexibility while producing different practical consequences. *Tamattu'* is widely used by Indonesian pilgrims because it allows a period outside *ihram* between the completion of Umrah and the beginning of Hajj. *Qiran* requires sustained *ihram* and combines the two acts, while *ifrad* is structurally simpler in intention but does not include Umrah within the same *ihram*. The choice among these forms should be taught together with the associated rules of *dam* and the operational schedule of the pilgrimage group.

Systematic Procedure of Hajj *Tamattu'*

Because *tamattu'* is particularly relevant to Indonesian pilgrims, its basic sequence can be summarized from the official *manasik* guidance. The outline presented here is practical and should be read together with detailed instruction concerning legal conditions, timing, sequence, concessions, and group movement arrangements (Kementerian Agama Republik Indonesia, 2024).

The sequence begins with entering *ihram* for Umrah from the designated *miqat* after preparation and intention, followed by the *talbiyah*. Upon reaching the Sacred Mosque, the pilgrim performs seven circuits of *tawaf* around the Ka'bah, continues with seven laps of *sa'i* between Safa and Marwah, and then shaves or shortens the hair to complete Umrah and leave the state of *ihram*.

On the appropriate date, the pilgrim enters *ihram* again from the place of residence in Makkah with the intention of Hajj and proceeds according to the official movement plan toward the sacred sites. The pilgrim then performs *wuquf* at Arafah within its legally valid time, moves to Muzdalifah for the prescribed stay and remembrance, and continues to Mina for the rites of the Day of Sacrifice, including stoning *Jamarat al-'Aqabah* and fulfilling the sacrificial obligation associated with *tamattu'*.

The pilgrimage then continues with *tawaf al-ifadah* and, where applicable, the Hajj *sa'i*, followed by the required *tahallul*. During the days of tashriq, the pilgrim observes the prescribed stay at Mina and stones the three *jamarat* according to the applicable schedule and legal concessions. Before finally leaving Makkah, *tawaf al-wada'* is performed when it is legally required (Kementerian Agama Republik Indonesia, 2024).

This systematic outline should be read together with the principle of facilitation. Modern pilgrimage movement is organized through group schedules, transportation systems, crowd-control measures, and official instructions intended to protect pilgrims. Compliance with legitimate organizational measures can become part of responsible worship when those measures protect safety, prevent disorder, and enable the rites to be completed within their legal time and place.

Contemporary Issues in Hajj and Umrah

Proxy Hajj (Hajj Badal)

Proxy Hajj refers to performing Hajj on behalf of another person. The majority of jurists permit representation under specific conditions, particularly for a deceased person who had an unfulfilled Hajj obligation or for a living person whose incapacity is permanent and who cannot reasonably undertake the journey. A key condition recognized in the *fiqh* literature is that the person acting as proxy should first have fulfilled his or her own Hajj obligation. Indonesian scholarship on Hajj substitution also demonstrates that the practice raises questions of legal basis, certainty, and implementation that require careful juristic reasoning (Nurdin & Rajab, 2020; Umar, 2020).

The contemporary challenge is not only the legal permissibility of proxy Hajj but also the commercialization of the service. Digital advertising can make it difficult for families to verify whether a named proxy actually performs the pilgrimage and whether the service complies with applicable pilgrimage rules. The *fiqh* principle of agency therefore needs to be accompanied by transparency, documented authorization, trustworthy implementation, and protection from fraud. This concern is consistent with Nurdin and Rajab's (2020) warning that implementation can create opportunities for abuse if legal and institutional safeguards are weak. A modern academic treatment should distinguish the validity of the underlying institution from the ethical and regulatory risks created by unaccountable commercial practice.

Women Performing Hajj without a *Mahram*

The question of a woman traveling for Hajj without her husband or a *mahram* is a classic example of juristic disagreement that requires contextual precision. Some juristic approaches emphasize the requirement of a husband or *mahram* for travel, while other recognized opinions allow an obligatory Hajj when safety is secured through trustworthy companionship or organized travel. Comparative studies confirm that both classical and contemporary scholars continue to differ on this issue (Hamdani, 2022). Contemporary Indonesian analysis further argues that structured group travel and institutional protection have become important elements in contextualizing the *mahram* requirement (Ali et al., 2025).

Accordingly, it is academically preferable to avoid claiming a single 'contemporary consensus.' The more defensible formulation is that permissive contemporary opinions exist and often rely on secure organized travel, while restrictive opinions continue to be held on the basis of hadith and classical travel rules (Ali et al., 2025; Hamdani, 2022; Umar, 2020). For actual pilgrims, the practical decision must also take account of the rules of the organizing authorities and the legal guidance adopted by the relevant religious institutions. This issue demonstrates why comparative *fiqh* should report the structure of disagreement rather than presenting contextual accommodation as the disappearance of disagreement.

Health-Related *Istitha'ah* and the Protection of Pilgrims

Health-related istitha'ah has become one of the most important contemporary issues in pilgrimage. The physical demands of walking, heat exposure, dense crowds, changes in sleep and diet, and the prevalence of chronic illness among older pilgrims make health preparation a direct component of the ability to perform Hajj safely. Indonesian research consistently supports the need for early identification of risk, coordinated screening, and health education (Alifia & Deswara, 2024; Susanto et al., 2024).

The policy dimension is equally important. Minister of Health Regulation No. 15 of 2016 provides the Indonesian framework for assessing Hajj health *istitha'ah*, while Idris and Nurwahyuni (2024) note both implementation achievements and the need for policy refinement. From an Islamic legal perspective, such assessment should not be framed as a conflict between medicine and religious duty. Rather, medical assessment supplies evidence relevant to the legal question of capacity. Where

serious harm is highly probable, the objectives of preserving life and avoiding preventable injury must be integrated into the determination of obligation and the use of legal concessions.

Recent studies also highlight the service implications of mass pilgrimage. Sugeng et al. (2024) describe the demanding roles of Indonesian Hajj health personnel, and Susanto et al. (2024) emphasize surveillance as part of health protection. These findings reinforce a broader conclusion: modern Hajj is a ritual act performed within a complex public-health environment. Good *fiqh* guidance must therefore be operationally informed, especially for older pilgrims and those with chronic disease.

Governance, Regulation, and Digital Transformation

Pilgrimage administration is another contemporary field in which ritual law meets institutional complexity. Aulia et al. (2024) identify regulatory change, technological development, market competition, visa arrangements, and service quality as major challenges in the Hajj and Umrah industry. Research on crowd technology and pandemic-era pilgrimage management similarly demonstrates that safety and service delivery increasingly depend on coordinated information systems and institutional design (Albattah et al., 2021; Basahel et al., 2021). These issues matter to *fiqh* because legitimate worship can be harmed by fraud, unsafe services, misinformation, or administrative disorder. Consumer protection and trustworthy service are therefore not external to the ethical purposes of pilgrimage.

In Indonesia, the legal framework for Hajj and Umrah administration has continued to evolve. Law No. 8 of 2019 established the national framework for Hajj and Umrah organization, and Law No. 14 of 2025 introduced a third amendment that strengthened institutional responsibilities, governance mechanisms, oversight, quota administration, emergency arrangements, and information systems (Government of Indonesia, 2025). For an Islamic jurisprudence article, these statutes do not determine the validity of ritual acts; however, they form the contemporary institutional environment within which Indonesian pilgrims prepare for and perform those acts.

Digitalization creates both opportunities and risks. Registration systems, health records, electronic information, group communication, crowd-monitoring technologies, and digital learning can improve preparedness and transparency (Albattah et al., 2021). Pandemic-era management also demonstrated how digital and administrative controls could support safe organization under exceptional conditions (Basahel et al., 2021). At the same time, online marketing can facilitate misleading claims, unauthorized travel offers, or unverifiable proxy-Hajj services. The ethical requirement of trustworthiness (*amanah*) should therefore be translated into traceable contracts, accurate information, accountable service providers, and effective regulatory oversight.

Spiritual, Social, Historical, and Economic Dimensions

The legal structure of Hajj and Umrah should not obscure their spiritual purposes. *Ihram* places pilgrims in a state of disciplined simplicity, reducing visible distinctions of status and directing attention toward obedience to God. Standing at Arafah intensifies repentance, prayer, and awareness of human dependence upon divine mercy. *Sa'i* symbolizes persistent effort joined with trust in God, while sacrifice and the rites at Mina cultivate obedience, self-restraint, and moral resolve. These meanings are not substitutes for legal compliance; rather, they explain why the law structures bodily actions in ways designed to educate the worshipper (Qardhawi, 2005).

Socially, Hajj brings together Muslims from different nations, languages, social classes, and cultural backgrounds within a shared ritual order. The uniformity of *ihram* and the common movement through the sacred sites create an experiential form of equality that can strengthen solidarity and global Muslim consciousness. Indra et al. (2024) similarly emphasize the spiritual and social consequences of pilgrimage, including unity, equality, sacrifice, and communal interaction. The ethical value of these experiences depends on whether the pilgrim carries them into post-pilgrimage conduct rather than treating them as temporary emotions.

The rites also preserve historical memory. *Sa'i* recalls Hajar's search for water; the Ka'bah connects the Muslim community with the Abrahamic tradition; and the sequence of Hajj reproduces practices taught through Prophetic precedent. Historical meaning therefore becomes part of religious education. Pilgrims do not merely visit historical locations; through ritual action they participate in a transmitted sacred narrative that links individual worship to collective memory.

Economically, Hajj and Umrah generate extensive activity in transportation, accommodation, catering, travel services, retail, financial management, and employment. Indra et al. (2024) discuss these

wider economic effects, while Aulia et al. (2024) show that the modern Hajj and Umrah industry is influenced by global market conditions and technological change. An Islamic perspective should evaluate this economic ecosystem not only in terms of growth but also in terms of fairness, transparency, reasonable pricing, protection of pilgrims, and the avoidance of exploitation.

Comparative Synthesis and Scholarly Implications

The comparative analysis produces several important distinctions. First, the obligation of Hajj for an able Muslim is established by consensus, but the obligation of Umrah is disputed. Second, the distinction between pillars and essential duties determines the legal consequence of omission and must be preserved in educational materials. Third, *istitha'ah* is a multidimensional legal concept whose modern application legitimately includes evidence from medicine, public health, transportation, and security. Fourth, contemporary questions such as women's travel, proxy Hajj, and digitalized services should be discussed through explicit juristic reasoning rather than simplified slogans.

These findings also clarify the relationship between classical *fiqh* and contemporary evidence. Modern research does not create the foundational acts of Hajj; those are determined by revelation and the juristic tradition. Contemporary scholarship instead helps assess circumstances in which those rules are implemented: health risks, organizational systems, regulatory safeguards, and patterns of service. The appropriate methodological relationship is therefore complementary. *Fiqh* provides normative categories, while empirical and institutional evidence provides contextual facts relevant to applying those categories responsibly.

This integrative approach also strengthens academic accountability. In a journal article, the use of religious authority should not become an excuse for incomplete referencing. Classical works should be identified bibliographically, contemporary claims should be supported by traceable scholarship, and government regulations should be linked to official legal sources. The revised reference architecture of this study therefore prioritizes sources that can be independently located through DOI records, official journal pages, government portals, or established published books.

A remaining limitation is that this article is a library-based doctrinal study and does not collect primary data from pilgrims, religious scholars, health workers, or pilgrimage administrators. It also does not attempt an exhaustive comparison of every subsidiary rule across all four Sunni *madhhabs*. Future research could combine doctrinal analysis with interviews, field observation, or survey data, particularly on health eligibility, women's pilgrimage experiences, digital-service accountability, and the effectiveness of *manasik* education.

Implications for *Manasik* Education and Pilgrim Literacy

The findings have direct implications for *manasik* education. Pilgrims need more than memorization of ritual sequences; they require legal literacy that enables them to distinguish pillars, essential duties, Sunnah acts, prohibitions, concessions, and the consequences of omission. This distinction becomes particularly important under crowded and time-sensitive conditions, where a pilgrim may need to follow an authorized alternative procedure without assuming that the worship has become invalid. Official *manasik* guidance already provides a practical framework for instruction, but its effectiveness can be strengthened by organizing learning around legal priorities and common decision points rather than around chronological memorization alone (Kementerian Agama Republik Indonesia, 2024).

A second implication concerns comparative *fiqh* literacy. Indonesian pilgrims may encounter guidance from scholars, group leaders, or fellow pilgrims who follow different juristic opinions. Without basic knowledge of legitimate *ikhtilaf*, such differences can generate unnecessary anxiety or conflict. *Manasik* education should therefore explain a limited number of high-impact differences—such as the status of Umrah, selected requirements of travel, the classification of particular duties, and recognized concessions—while emphasizing that valid disagreement must be grounded in established juristic reasoning. A broad educational overview such as that provided by Natasya et al. (2026) is useful for introductory orientation, but advanced guidance for prospective pilgrims should connect general explanation to the legal consequences of each rule.

A third implication is the integration of health literacy into religious preparation. Health screening should not be taught as an external bureaucratic requirement imposed after religious instruction has been completed. It should be presented as part of responsible preparation for *istitha'ah*,

especially for older pilgrims and those with chronic disease. Practical education can include medication management, hydration, heat-risk awareness, mobility planning, infection prevention, and knowledge of when legal concessions are available. Evidence from health surveillance and the experiences of Indonesian Hajj health personnel confirms that preparation and risk communication are essential for safe worship under mass-gathering conditions (Sugeng et al., 2024; Susanto et al., 2024).

Finally, contemporary *manasik* programs require digital and consumer literacy. Prospective pilgrims increasingly receive information through social media, messaging applications, online travel marketing, and electronic service systems. These channels can improve access to education but can also circulate inaccurate legal claims or misleading commercial offers. In line with the governance challenges identified by Aulia et al. (2024), pilgrimage education should teach pilgrims to verify official information, use authorized service providers, preserve transactional records, and distinguish religious advice from commercial promotion. Such literacy supports the ethical objectives of *amanah*, transparency, and protection from harm and extends the educational purpose of *manasik* beyond ritual performance to responsible participation in the modern pilgrimage ecosystem.

CONCLUSION

Hajj and Umrah are structured acts of worship in which legal rules, spiritual formation, social meaning, and contemporary institutional realities intersect. Hajj is obligatory once in a lifetime for Muslims who possess genuine *istitha'ah*, while the legal status of Umrah remains a recognized area of juristic disagreement. A sound academic explanation must therefore distinguish consensus from *madhhab*-based differences and must separate pillars, essential duties, recommended practices, and compensatory consequences with precision.

The contemporary relevance of *fiqh* becomes especially clear in questions of proxy Hajj, women's travel without a *mahram*, *health-related istitha'ah*, and modern governance. These issues cannot be resolved responsibly by repeating ritual descriptions alone. Classical legal reasoning must be read together with evidence about safety, health, organization, and regulation, while remaining anchored in the principles and objectives of Islamic Sharia. In this respect, modern medical and administrative knowledge does not replace *fiqh*; it supplies contextual evidence that helps determine how *fiqh* applies under present conditions.

The principal contribution of this study is its integration of doctrinal *fiqh*, comparative analysis, contemporary scholarship, and verifiable references within one framework. For journal publication, this approach improves both substantive quality and scholarly transparency. Future empirical research can extend the analysis by examining how pilgrims, guides, health professionals, and administrators understand and operationalize these principles in actual pilgrimage practice.

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