CHAPTER II
LITERATURE REVIEW

This chapter presents a brief explanation of some theories that support the study. The theories are related to Nadiem Makarim's public statement in Tempo, *Merdeka Belajar* Policy, ideology in *Merdeka Belajar*, power relation in *Merdeka Belajar*, and the explanation of Fairclough Three-Dimensional model of Critical Discourse Analysis (CDA).

A. Theoretical Framework

1. Nadiem Makarim Public Statement in Tempo

Nadiem Makarim's public statements regarding *Merdeka Belajar* in news article Tempo are the focus of Critical Discourse Analysis in this study. Highlighting how language reflects ideology and power in education reform. These statements are in line with the philosophical foundation of the Tut Wuri Handayani concept by Ki Hadjar Dewantara which emphasizes key principles such as independence, inclusiveness, and flexibility. Through its language, *Merdeka Belajar* is not only a policy but also a transformative movement that Nadiem frames which aims to reshape the Indonesian education system to be in line with contemporary needs (Kemendikbud, 2020).

In the context of this research, linguistic elements in the form of lexical choices, metaphors, transformations, and transitivity are analyzed through Nadiem's   discourse. For example, lexical choices such as "*Kemerdekaan*" (Independence) and "*Gerakan*" (Movement) are deliberately made optimistic by using terms that evoke a sense of progress and collective empowerment. These lexical choices aim to align not only public trust but also policy makers with the ideological foundation of *Merdeka Belajar* and

frame it as a necessary and progressive reform.

2. Merdeka Belajar Policy

The *Merdeka Belajar* policy launched by Nadiem Makarim as Minister of Education is a transformative initiative that aims to overhaul the Indonesian education system by prioritizing independence and flexibility with a focus on character development (Salamah et al., 2024 ; Trianung et al., 2024) . Ki Hadjar Dewantara's educational philosophy is the inspiration for this policy which emphasizes "Kemandirian" (Independence) and "Kebebasan" (Freedom) as core values, with the aim of empowering institutions, teachers, and students to take ownership in the learning process (Benu & Marzuki, 2024; Efendi et al., 2023). The transition from the National Examination to the Minimum Competency Assessment, the school zoning system, and an adaptive curriculum are important elements that comprise the *Merdeka Belajar* policy (Salamah et al., 2024) . These steps aim to provide equitable access to education and encourage teaching methods that prioritize creativity and critical thinking among students (Kompas, 2020); Kemendikbud, 2019).

In the context of this research, *Merdeka Belajar* is described as an education policy that not only brings structural changes, but also ideological and power changes in the education system in Indonesia. Independence at every level of education is driven by this policy which provides space for schools to adjust the learning process to the needs of each region. In discourse analysis, the language used by Nadiem in promoting the policy reflects values

such as freedom and innovation, which are intended to shape public perceptions of education that is oriented towards basic competencies and character development. Through the Critical Discourse Analysis approach, this research will reveal how Nadiem's choice of words and linguistic structures strengthen his ideology and how the government's efforts to distribute power more evenly in the education system (East Asia Forum, 2023; (Kemendikbud, 2019).

3. Ideology in The *Merdeka Belajar*

In this study, Ideology refers to a set of basic beliefs and principles communicated and reinforced through Nadiem Makarim's public statements (Yang, 2023) . Ideology is expressed through the principles and values embedded in Nadiem's public statements in the context of *Merdeka Belajar*. Schools are given autonomy in implementing policies where the Ideology of "*Kemerdekaan*" (Independence) is emphasized to suit the context of their respective regions. Through a discourse, Nadiem often articulates the importance of freeing students from a rigid curriculum, thus encouraging flexible and student-centered learning. This belief in reforming education is reflected in his ideological position so that it is no longer centered on exams, but in a more holistic way with a focus on literacy-numeracy and character development as its basic competencies. Therefore, Nadiem's public statements do not merely communicate policy objectives but underline a broader educational philosophy regarding reform and empowerment (East Asia Forum, 2023; Kompas, 2020).

Talking about education reform, Indonesia is not the first to do this. The case of educational reform in Finland provides an example that is relevant to *Merdeka Belajar*, especially in terms of decentralization and granting broad autonomy to schools and teachers (Suwalska, 2022 ; Chung, 2023). Since the 1970s, Finland has implemented reforms that focus on equalizing learning opportunities and improving the quality of teaching by providing more flexibility to determine learning methods and local curricula at each school (Cahyani, 2023 ; Kosenchuk et al., 2023 ; Liu, 2024). This step was taken in response to a system that was previously very centralized and based on strict exams, so Finland decided to eliminate external standardized tests and provide space for teachers to evaluate students narratively, with an emphasis on problem solving and the development of analytical skills (English et al., 2022 ; Lavonen, 2020) This approach aims to advance independent learning and critical thinking skills in students, which is in line with *Merdeka Belajar's* core values to encourage independent learning

and be relevant to today's needs (Centre for Public Impact, 2019 ; Scope, 2010).

However, decentralization in Finland also presents challenges that are worth paying attention to, especially regarding differences in policy implementation in each region (Osifo, 2020). For example, even though the central government has provided curriculum guidelines, implementation at the regional level shows significant variations because each region has different strategies and resources to support the various needs of students, students with special needs (Bartolini et al., 2016; Osifo, 2020). This case can be a lesson in the *Merdeka Belajar* policy regarding the importance of maintaining a balance between regional autonomy and central government support to ensure even and consistent implementation throughout Indonesia (Ahtiainen et al., 2021).

The Finnish reform model shows how schools and teachers given autonomy can increase creativity and teaching effectiveness, but also require strong supporting policies to reduce the quality gap between regions. This case can provide insights, especially in terms of building a responsive system while still ensuring equal distribution of education quality in the implementation of the *Merdeka Belajar* policy.

4. Power Relation in The *Merdeka Belajar*

Power relations according to Avdagić & Dzanić (2023) are defined as the dynamics of authority, control, and influence. In the context of this research, power relations are reflected in Nadiem's public statement regarding the *Merdeka Belajar* policy. Moreover, Foucault sees power as something that is distributed and present in every layer of social relations, including the educational layer (Liu, 2024). For Foucault, power is not only domination, but also the process of subject formation through rules and norms that direct individual actions without coercion. Foucault argues that power in the context of education works through discourse that determines how

9

education is understood and implemented and also shapes the way an individual thinks and acts within it (Christensen, 2023). In this case, power does not only lie in one party but is distributed through mechanisms of social control and knowledge that are interrelated in shaping individual and group behavior (Sociology Institute, 2022; Infed.org, 2023).

The Merdeka Belajar policy also highlights power relations in the education system, where discourse functions as a tool for negotiating authority and influence (Drackley, 2020). Nadiem's emphasis on decision-making, such as licensing schools that determine assessment methods and manage resources, reflects the shift in power from central authorities to schools. A responsive education system that can adapt to regional disparities is the goal of this decentralization. In reality, the implementation of this autonomy faces challenges, such as disparities in school resources and disparities between regions. Nadiem's discourse seeks to legitimize this policy change and distribute authority across all levels of the education system by positioning educational leaders and institutions as central agents (East Asia Forum, 2023; Kemendikbud, 2019).

5. Critical Discourse Analysis

Critical Discourse Analysis (CDA) was chosen as the approach in this study. Issues related to ideology, power, and inequality are mainly discussed in CDA, which is embedded in a discourse that aims to reveal the hidden power dynamics that shape social practices and structures (Van Dijk, 1993; Wodak & Meyer, 2009). CDA is not just an analytical tool but operates "in a dialogical relationship with other social theories and methods," engaging them in a transdisciplinary way to deepen the understanding of language in social contexts (Wodak & Meyer, 2001). According to Fairclough (1995) , discourse is treated by CDA as a form of social practice, which recognizes that language shapes and is shaped by the structures of wider society, thus affecting how people view power relations and social realities. Based on the context of this study, CDA is applied to examine how the language in Nadiem

Makarim's public statements reflects the ideology in the *Merdeka Belajar* policy. By analyzing these discourses, CDA seeks to reveal the implicit ways in which educational ideology and the legitimacy of power are reinforced through language in the Indonesian education system.

6. Critical Discourse Analysis of this Study

This research uses Critical Discourse Analysis (CDA) to examine how Nadiem Makarim's public statement on *Merdeka Belajar* policy in Tempo described through Fairclough Three-Dimensional model. It also includes the relationship between ideology and power in the discourse surrounding *Merdeka Belajar* which is represented in public statements in Tempo. With Fairclough's Three-Dimensional model used, how language shapes and is shaped by the broader social context is investigated in this study. This process involves three levels. The first is Description (Text Analysis), then Interpretation (Processing Analysis), and Explanation (Social Analysis) each of which reveals different dimensions of discourse in relation to ideology and power.

a. Description (Text Analysis)

At this level, linguistic characteristics such as lexical choice, transformation, and transitivity are focused on being studied in statements regarding *Merdeka Belajar*. These elements are expected to reflect ideological attitudes and build narratives that align policies with social values. These elements will be explained as follows:

1) Lexical Choice

Lexical choices reveal the writers' perspectives on the news they create because they are free to choose the right lexical terms to explain a news. In addition, lexical choices establish certain types of identities, values, and sequences of events that are not stated directly in the text (Fowler, 1991, in Das, 2011).

2) Transformation

Transformation is described by how the ideology in discourse changes. This transformation consists of nominalization and passivization. Nominalization is the stage when verbs and adjectives are changed into nouns to make an issue into a phenomenon, with the aim of eliminating the actor in the text. For example, *they decide to* can be changed to *the decision*. *The decision* here is a passive reduction that changes a phrase into a singular noun. While passivization usually removes or moves the agent (actor) to the middle or even the end of the phrase. For example, *Amy buys a book* can be changed to the passive sentence *A book purchased by Amy*. Active sentences emphasize the social actor who performs the action and causes the impact, while passive sentences highlight the actions of the social actor (Fairclough, 1995).

3) Transitivity

The different processes that one can use to describe the real world are called transitivity systems. According to Halliday et al. (2004) transitivity systems construct the world of experience into a series of manageable process types. Real-world events can be represented as aspects of language through three semantic categories, namely circumstances, processes, and participants (Gerot & Wignell, 1994). There are six types of transitivity processes as explained as follows:

- Material process shows the process of doing something. For example, Rafael plays football. This process includes the doer (actor) the action verb (material process) and the target of action (goal).

- Verbal process shows the process of saying. For example, Mother said keep quiet. This process includes sayer, verb, and receiver.

- Mental process shows the process which involves psychological phenomena such as perception, reaction, and cognition. For example, *I think about the show.* This process includes senser, verb, and the phenomenon.

- Behavioral process shows the combination between physiological process such as smile, laugh, angry, etc. For example, *he sighed in relief.* This process includes behaver, behavioral, and circumstance.

- Relational process show relationship (being and having) and often use "to be" or "to have." For example, *the car is red.* This process includes carrier, relational process, and attribute.

- Existential process indicates the existence of something. For example, *there was a loud noise outside.* This process includes existence, existential, and circumstances.

By analyzing these language features, the Description phase seeks to uncover how specific terms or phrases reinforce positive associations with the policy, framing it as a beneficial and transformative initiative in the education sector.

b. Interpretation (Processing Analysis)

The Interpretation level investigates how discourse is produced, distributed, and consumed in society. This phase aims to analyze the force, coherence, and intertextuality of texts through the analysis of discursive practice (Fairclough, 1992).

There are three primary methods employed for the examination of news sources in news discourse. According to Halloran et al. (1970) there are three types of sources: specific, semi-specific, and unspecific. Specific source refers to identifying the information's source explicitly.

Semi-specific refers to the use of language that suggest something indirectly. Regarding the unspecific source, the writer intends to keep it secret or does not even know the source. In addition, Fairclough (1995) distinguishes between two main categories of reporting styles. Namely Direct Discourse (DD) and Indirect Discourse (ID). Sentences that maintain the original meaning without modification are classified as Direct Discourse while the transcription process from the original material is classified as Indirect Discourse.

This aims to analyze how the *Merdeka Belajar* language is constructed to influence public perceptions, build coherence in policy narratives, and build interconnections with broader educational goals. This analysis will also analyze whether the discourse makes this policy important and widely supported, so that it has the potential to build consensus among various stakeholders in the education sector. By understanding the production and interpretation of these statements, this stage seeks to uncover the discursive strategies that help legitimize the policy.

c. **Explanation (Social Analysis)**

The Explanation Phase positions the *Merdeka Belajar* discourse in a broader socio-cultural context. The relationship between discourse practices and social contexts is examined in the analysis of socio-cultural practices (explanation). The purpose of this analysis is to identify explanations regarding the results of description and interpretation. At this stage, researchers examine and explain the relationship between textual trends, complex discourse practices, and processes of social change. Researchers also refer to the socio-cultural context of the text produced to explain the results of the interpretation. Situational, institutional, and socio-cultural conditions are separated into these categories by (Fairclough et al., 1989) . When a text is written, a particular scenario is called situational. While institutional refers to how organizational institutions

impact written language. Regarding social (socio-cultural) are macro things in society, such as economic systems, political systems, or the culture of society.

At this study, it investigates how social structures and power relations shape and are shaped by discourse around policy. This chapter explores how institutional, situational, and sociocultural factors influence the framing of *Merdeka Belajar* as an educational "movement" and how this framing can instill certain ideological values into people's consciousness. This stage aims to explain how this discourse reflects and strengthens power dynamics in the Indonesian education system, thereby potentially positioning *Merdeka Belajar* as a cornerstone of educational identity in Indonesia.

Through this CDA approach, how the language in the discourse of *Merdeka Belajar* communicates ideology and legitimizes the shift in authority in the education system is attempted to be revealed in this study. Thus, providing a critical perspective to understand the role of discourse in the acceptance and implementation of policies.

B. Study of Relevant Research

Before conducting this research, several studies were reviewed that talk about public statements related to education policy in Indonesia. The order of several studies reviewed is as follows.

Obos et al. (2022) analyzed Nadiem Makarim's speech on National Education Day using Fairclough's three-dimensional framework. They examined the micro, mezzo, and macro levels that reveal how Nadiem's language emphasizes audience inclusivity and connects to the sociocultural context. The findings of this study are that through linguistic choices such as polysemy and metonymy, Nadiem builds solidarity with teachers and demonstrates ideological commitment to education reform.

Another research by Azizah & Putra (2024) conducted research on Nadiem

Makarim and Muhadjir Effendy's speeches using Fairclough's Critical Discourse Analysis approach. They compared the language styles used by two ministers and observed that Nadiem's speech used modern and interesting language which made it attractive to younger audiences. Meanwhile, Effendy's approach to his speech used traditional expressions, so that his delivery was less impactful and considered stiff. This study highlights how language choices in educational leadership reflect ideological goals while also showing the role of discourse in shaping public perception and support.

Research about Nadiem Makarim and Muhadjir Effendy speeches also conducted by Wahyuni & Syamsi (2019) with a focus on language and ideology using Fairclough's three-dimensional framework. Their research identified that although both speakers used formal language, Nadiem's speech was more innovative and engaging to the audience. This research finds the potential of language in policy discourse to convey complex ideological messages within the education system.