



“AN INJURY TO ONE IS AN INJURY TO ALL”: PERCEPTIONS OF MORAL AUTHORITY AND POLITICAL INFLUENCE OF THE SOUTH AFRICAN DEMOCRATIC TEACHERS UNION IN EDUCATIONAL POLICY DEVELOPMENT

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This research examines the perceived moral authority and political influence of teacher unions in the context of educational sustainable policy development in South African public schools. This study employs Legitimacy Theory and Power Theory to analyse the South African Democratic Teachers Union (SADTU) as a legitimate representative body and a politically influential entity in shaping educational sustainable policy development. A qualitative research methodology was employed, involving data collection through semi-structured interviews with principals, members of the School Management Team (SMT), representatives of the School Governing Body (SGB), and union officials. The data were analysed through thematic analysis. The findings identify four primary themes: (1) teacher unions as sources of moral authority based on advocacy and historical legitimacy, (2) teacher unions as political actors that shape policy dialogues and decision-making, (3) tensions and conflicts regarding power, accountability, and dominance in educational governance, and (4) opportunities for collaborative and constructive engagement in policy processes. The findings demonstrate that teacher unions play a crucial role in fostering democratic participation and representation in educational contexts. However, notable challenges persist, particularly regarding the balance between moral legitimacy and political power, as well as the need for accountability within governance frameworks. This study enhances the existing literature on educational governance and policy by emphasizing the importance of recognizing teacher unions as dual entities that embody both legitimacy and power within education systems. The recommendation emphasizes the creation of balanced, contextually responsive frameworks that facilitate constructive engagement among teacher unions, policymakers, and school leadership to enhance democratic participation and effective educational governance.

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1. INTRODUCTION AND BACKGROUND TO THE STUDY

Teacher unions have become pivotal entities in modern education systems, broadening their impact beyond conventional labour relations to include policy engagement, governance, and political engagement in the development of sustainable educational policy.¹ In various national contexts, unions have expanded their roles beyond negotiating working conditions to actively shape educational reforms, influence sustainable policy development agendas, and participate in decision-making processes that affect the overall functioning of education systems.² The expanded role of teacher unions has established them as professional advocates and political stakeholders, functioning within intricate and frequently contentious policy contexts. This dynamic is especially evident in the South African context. Since the establishment of democracy in 1994, education reform has been guided by principles of equity, participation, and democratic governance, with teacher unions playing a significant role in advancing these ideals.³ The South African Democratic Teachers Union (SADTU) has established itself as a significant entity, with a history of pursuing social justice and reforming the education system. The historical positioning of SADTU has fostered its perceived moral authority, rooted in its advocacy for educators' rights and its overarching commitment to social and political transformation in the development of sustainable educational policy.

In addition to its moral stance, SADTU is acknowledged as a significant political entity in educational sustainable policy development arenas. Its participation in policy dialogues, governance frameworks, and extensive political networks has enabled it to significantly influence educational

¹ N Bascia, 'Teacher unions and educational change: Reconciling competing narratives' (2021) 35(4) *Educational Policy* 589-609.

² TM Moe, *The Politics of Teachers Unions and Education Reform* (Cambridge University Press 2022).

³ C Soudien, V Reddy and J Harvey, 'The impact of COVID-19 on a fragile education system: The case of South Africa' (2022) 26 *Education as Change* 1–15.

decision-making.⁴ The dual positioning of moral authority and political force creates a significant tension central to this study. Recent research indicates that teacher unions play a role in enhancing democratic participation and policy responsiveness; however, their influence raises issues regarding power concentration, accountability, and the politicization of education.⁵ Union involvement has, in certain instances, been correlated with enhanced advocacy and better working conditions; conversely, it has also been associated with tensions in governance structures and difficulties in policy implementation. This highlights an ongoing discussion in the literature about the role of teacher unions, raising questions about whether they primarily facilitate democratic governance or serve as influential entities that may not consistently align with broader educational goals.

The debate centres on the concept of moral authority, defined as the degree to which an institution is regarded as legitimate, trustworthy, and ethically sound. Teacher unions in post-apartheid South Africa derive authority from their historical role in opposing inequality and promoting social justice. Moral authority is dynamic; it is perpetually negotiated and contested within changing policy contexts. The interplay of political influence prompts critical inquiries regarding the construction, maintenance, and potential challenges to legitimacy within educational systems. Educational policy dialogues are not neutral; they are shaped by power dynamics, conflicting interests, and institutional limitations. The dialogues encompass various stakeholders, such as policymakers, school leaders, governing bodies, and unions, each contributing distinct priorities and forms of influence. In these contexts, teacher unions such as SADTU significantly influence both the results of policy discussions and the methods by which decisions are negotiated and implemented.

Although there is an increasing body of research on teacher unions, much of the current literature emphasizes their functions in collective bargaining, labour relations, and governance frameworks, while

⁴ V Govindasamy and R Mestry, 'The role of teacher unions in school governance and management in South Africa' (2022) 42(2) *South African Journal of Education* 1-10.

⁵ JR Malin, C Lubinski and E DeBray, 'Shaping education policy: Power and process in policy networks' (2021) 35(1) *Educational Policy* 5-28.

insufficiently addressing their perceived status as moral and political entities in policy discussions. This indicates a notable gap, especially within the South African context, where the historical and political positioning of teacher unions introduces a distinct layer of complexity to their educational role. In this introduction section, we provided context on the problem and the study's original contributions in light of SADTU's moral authority and political influence for sustainable development. In the next section, we then consecutively conceptualised moral authority and political influence for sustainable development, including recommendations thereof. We also highlighted the gaps in existing moral authority and political influence for sustainable development before presenting the study's concluding remarks.

2. PROBLEM STATEMENT

Teacher unions are recognized as significant participants in educational systems; however, there is a lack of a comprehensive understanding of the perceptions and experiences of their moral authority and political influence in educational policy discussions. Current studies have inadequately examined how these dual dimensions' influence union engagement, decision-making processes, and the broader context of educational governance. In South Africa, this gap is exacerbated by the significant influence of the South African Democratic Teachers Union (SADTU), which permeates various levels of the education system. While the role of advancing educators' rights and contributing to policy processes is well established, there is a lack of empirical investigation into stakeholders' perceptions of its authority and influence in policy dialogues. The lack of understanding limits the ability to critically evaluate whether SADTU's engagement in educational policy discussions improves democratic participation and policy efficacy, or exacerbates tensions, power disparities, and governance challenges. In the absence of this insight, attempts to enhance educational policy processes may fail to adequately consider the complex and multifaceted role of teacher unions.

2.1 Aim of the study

This study investigates the perceptions of moral authority and political influence held by the South African Democratic Teachers Union (SADTU) within educational policy discussions in South African public schools.

2.2 Objectives of the study

- To examine how SADTU is perceived as a source of moral authority in educational policy discussions.
- To analyse the extent of SADTU's political influence on the formulation of educational policy processes and decisions.
- To examine the tensions and contestations associated with SADTU's dual role as both a moral and political actor.
- To identify opportunities for enhancing collaboration and effective engagement between teacher unions and other stakeholders in educational policy discussions.

3. THEORETICAL FRAMEWORK: LEGITIMACY AND POWER THEORY

This study is based on an integrated framework that utilizes Legitimacy Theory and Power Theory to analyse the dual role of the South African Democratic Teachers Union (SADTU) as a moral authority and a political actor in educational policy discussions. This integrated framework facilitates a detailed examination of the ways in which teacher unions obtain, maintain, and exert influence in policy environments marked by conflicting interests, institutional limitations, and evolving power dynamics.

Educational policy dialogues are inherently non-neutral and not merely technical; they represent socially constructed spaces where various actors engage in negotiations regarding meaning, authority, and influence. In these contexts, legitimacy and power function as interrelated constructs,

influencing both participation and outcomes. This study integrates Legitimacy Theory and Power Theory to examine how SADTU's influence is perceived, enacted, and contested in educational governance.

- *Legitimacy Theory*

Legitimacy Theory provides a framework for analysing how institutions obtain and sustain social acceptance and normative approval in specific contexts.⁶ The theory, initially developed in organisational studies, has seen growing application in public sector and educational contexts to elucidate how institutional actors establish credibility, trust, and authority.⁷

Legitimacy is generally understood through three interconnected dimensions:

- Pragmatic legitimacy refers to the perceived utility or advantage of an institution for its stakeholders.
- Moral legitimacy is based on normative assessments of the righteousness or social appropriateness of an institution's actions.
- Cognitive legitimacy pertains to the unquestioned acceptance of these actions within a social system.

Legitimacy Theory is pertinent for analysing SADTU's perception as a moral authority in educational policy discussions within this study. The historical role of SADTU in advocating for educators' rights and its contributions to broader social justice movements in post-apartheid South Africa establish a basis for its moral legitimacy. The legitimacy is dynamic, continuously constructed and negotiated through actions, engagements, and relationships with various stakeholders. Legitimacy may also be subject to contestation. As unions expand their influence in policy and political arenas, inquiries emerge concerning the degree to which their

⁶ MC Suchman, 'Managing legitimacy: Strategic and institutional approaches' (1995) 20(3) *Academy of Management Review* 571–610.

⁷ A Bitektine and P Haack, 'The "macro" and the "micro" of legitimacy: Toward a multilevel theory of the legitimacy process' (2020) 45(1) *Academy of Management Review* 49–75.

actions remain consistent with overarching educational and societal objectives. Legitimacy Theory facilitates an analysis of the sources and limitations of SADTU's moral authority, especially in contexts where its influence is viewed as either promoting or hindering effective governance.

- *Power Theory*

This study utilizes Power Theory, specifically Lukes three-dimensional view of power, to analyze how SADTU influences educational policy dialogues, thereby complementing the examination of legitimacy. Power encompasses not only observable decision-making but also the capacity to shape agendas, control discourse, and influence perceptions and preferences.⁸

Lukes' framework delineates three dimensions of power.

- Visible power entails active involvement in decision-making processes.
- Hidden power pertains to the capacity to establish agendas and dictate which issues are acknowledged.
- Invisible power encompasses the manipulation of beliefs, values, and perceptions, thereby affecting individuals' understanding and responses to various issues.

In discussions of educational policy, these dimensions of power are especially significant. Teacher unions like SADTU can demonstrate influence by engaging in governance frameworks and policy discussions. Simultaneously, they may exercise concealed power by determining the prioritization of issues in policy discussions, and subtle power by influencing prevailing narratives concerning education, professionalism, and rights. Power Theory offers a crucial framework for analyzing SADTU's political influence, which is manifested not only through formal mechanisms but also through discursive and relational processes that influence the wider policy context.

⁸ S Lukes, *Power: A Radical View* (2nd edn, Palgrave Macmillan 2005).

The combination of Legitimacy Theory and Power Theory facilitates a thorough examination of SADTU's function in educational policy discussions, highlighting its moral legitimacy and political influence. Legitimacy serves as the basis for acceptance and authority, whereas power dictates the degree to which that authority can be converted into influence over decisions and outcomes. The dual lens is crucial for comprehending the tensions and contradictions highlighted in this study. SADTU's moral authority enhances its role in policy dialogues, establishing it as a credible representative for educators. Conversely, its political influence may lead to contestation, especially when its actions are viewed as monopolizing decision-making processes or promoting particular interests. This framework analyses the relationship between legitimacy and power, transcending simplistic views of teacher unions as solely advantageous or detrimental. It characterizes them as multifaceted institutional agents whose impact is determined by normative acceptance and strategic agency.

4. LITERATURE REVIEW: MORAL AUTHORITY, UNIONS INFLUENCES, POLICY CONVERSATION, TENSIONS AND GOVERNANCE

The literature review is a vital element of this study, establishing a conceptual and empirical basis for analyzing the perceptions of moral authority and political influence of teacher unions in educational policy discussions. The study is positioned within current academic discussions, delineates significant theoretical and empirical trends, and underscores areas that require additional research. This review specifically addresses literature that views teacher unions as institutional actors functioning at the nexus of legitimacy and power, thus aligning with the theoretical framework of the study.

This review employs a thematic and analytical approach, synthesizing existing scholarship to clarify the role of teacher unions within contemporary education systems, rather than providing a descriptive account of current studies. This study emphasizes four interconnected domains: (1) moral authority and legitimacy within education, (2) teacher unions as political entities, (3) educational policy dialogues as arenas of

contention, and (4) the tensions and governance challenges linked to union participation. This thematic organization facilitates a coherent interaction with the literature and establishes a framework that guides the analysis of the study's findings.

4.1 Moral Authority and Legitimacy in Educational Contexts

The notion of moral authority has garnered significant interest in educational research, especially concerning the ways in which institutions and individuals establish legitimacy within intricate governance frameworks. Legitimacy, as defined in organizational and institutional literature, pertains to the perception that an entity's actions are desirable, appropriate, and consistent with socially constructed norms and values.⁹ In the realm of education, legitimacy is frequently associated with trust, ethical behavior, and dedication to overarching societal objectives.

Teacher unions in post-apartheid contexts, such as South Africa, gain substantial legitimacy from their historical advocacy for equity, justice, and the professional rights of educators.¹⁰ This historical context enhances their perceived moral authority, allowing them to hold significant roles in educational discourse and policy engagement. It is argued posits that teacher unions have progressively redefined their objectives to encompass not only labour rights but also a wider dedication to enhancing educational quality and social outcomes.¹¹

Legitimacy is dynamic; it is perpetually constructed, negotiated, and contested within changing policy contexts. Recent studies indicate that as teacher unions broaden their involvement in policy and political spheres, their moral authority may face examination, especially when their actions are viewed as favouring particular interests over overarching educational objectives.¹² This presents a significant tension between normative

⁹ Bitektine and Haack (n 7).

¹⁰ Soudien, Reddy and Harvey (n 3).

¹¹ Bascia (n 1).

¹² Moe (n 2).

legitimacy and perceived self-interest, prompting essential inquiries regarding the ways in which teacher unions maintain their moral authority amid increasingly complex governance contexts.

4.2 Teacher Unions as Political Entities in Educational Frameworks

A substantial body of literature identifies teacher unions as important political entities in education systems, affecting labour relations as well as policy development, execution, and reform.¹³ This shift indicates a broader redefinition of unions as entities involved in policy advocacy, agenda-setting, and strategic negotiation within political and institutional contexts. Teacher unions actively engage in educational policy discussions, utilizing their organizational strength, membership, and political connections to impact decision-making processes.¹⁴ Their participation may enhance the inclusivity and representativeness of policy processes, ensuring the integration of educators' perspectives into policy development. Their political engagement introduces complexities concerning power dynamics, influence, and control, especially when unions hold substantial leverage within governance structures.

The South African Democratic Teachers Union (SADTU) serves as a notable example of this dual role within South Africa. The organization's historical alignment with broader political movements and its ongoing involvement in policy processes establish it as a significant contributor to educational discourse and decision-making.¹⁵ This positioning raises concerns about the potential politicisation of education, where policy decisions may be influenced by political considerations rather than solely educational priorities.

¹³H Stevenson, B Carter and R Passy, 'New professionalism, workforce restructuring and the politics of teacher unionism' (2020) 35(5) *Journal of Education Policy* 601–620.

¹⁴ Moe (n 2).

¹⁵ J Heystek and R Terhoven, 'Motivation for teacher participation in school governance' (2020) 40(3) *South African Journal of Education* 1–9.

4.3 Educational Policy Dialogues as Contested Domains

Educational policy dialogues are increasingly viewed as contested and negotiated arenas, rather than as neutral platforms for technical decision-making.¹⁶ The dialogues encompass various stakeholders, such as policymakers, school leaders, unions, and communities, each contributing unique interests, values, and influences. In these contexts, power functions through formal and informal mechanisms, influencing both the results of policy discussions and the decision-making processes. Consequently, policy dialogues serve as platforms where legitimacy, authority, and influence are perpetually negotiated. Teacher unions, due to their organizational strength and historical context, frequently assume a pivotal role in these negotiations.

Recent research indicates that the involvement of diverse stakeholders in policy discussions can improve democratic engagement and policy responsiveness; however, it may also result in conflict, contestation, and increased complexity, especially when interests are not aligned.¹⁷ This highlights the significance of viewing policy dialogues as dynamic and relational processes, influenced by structural conditions and the agency of involved actors.

4.4 Tensions and Governance Challenges in Unionized Contexts

Teacher unions' participation in educational governance presents various tensions and challenges, especially concerning accountability, leadership authority, and policy implementation. Unions are essential in representing educators and fostering participatory governance; however, their influence can also lead to power imbalances and increased organizational complexity within schools and the wider education systems.¹⁸

Empirical studies demonstrate that union involvement can both improve

¹⁶A Walker and H Qian, 'Developing a model of school leadership in policy contexts' (2020) 48(1) *Educational Management Administration & Leadership* 3–21.

¹⁷ Malin, Lubienski and DeBray (n 5).

¹⁸ Moe (n 2).

and limit governance processes. Unions play a significant role in advocacy, providing professional support and safeguarding educators' rights, which enhances institutional accountability. Conversely, their influence may pose challenges concerning role ambiguity, decision-making authority, and the alignment of organizational goals.¹⁹ The tensions are especially pronounced in contexts characterized by constrained governance structures due to resource limitations, socio-economic inequalities, and challenges in institutional capacity.²⁰ In these environments, the role of teacher unions becomes increasingly complex as they manage conflicting demands and expectations within the education system.

The literature review indicates that teacher unions hold a complex role within education systems, serving both as sources of moral authority and as significant political actors. Existing scholarship has significantly contributed to understanding these roles; however, there is a limited focus on how these dimensions are perceived and experienced in educational policy dialogues, especially within the South African context. The relationship between legitimacy and power, which is crucial for comprehending the dual role of teacher unions, has not been adequately examined in a cohesive way. This indicates a significant deficiency, as it fails to acknowledge the relational and negotiated aspects of union influence in policy contexts. This study investigates the perception of the South African Democratic Teachers Union (SADTU) as both a moral authority and a political actor, contributing to a nuanced understanding of the influence of teacher unions in educational policy discussions.

5.0 RESEARCH METHODOLOGY AND METHODS

This research is situated within the interpretivist paradigm, aiming to comprehend social phenomena by examining the meanings individuals attribute to their experiences in particular contexts.²¹ The interpretivist

¹⁹ Heystek and Terhoven (n 15).

²⁰ N Spaul and S Van der Berg, 'Learning losses and educational inequalities in South Africa' (2022) 90 *International Journal of Educational Development* 102552.

²¹ JW Creswell and CN Poth, *Qualitative Inquiry and Research Design: Choosing Among Five Approaches* (4th edn, SAGE Publications 2018).

approach is suitable for this study, facilitating a thorough examination of the South African Democratic Teachers Union (SADTU) as it is viewed both as a moral authority and a political entity in educational policy discussions.

A qualitative research approach was utilized to elucidate the complexity and context-dependent characteristics of these perceptions. Qualitative inquiry facilitates the exploration of complex experiences, interpretations, and meanings that quantitative methods cannot sufficiently address.²² This method effectively analyses the construction and negotiation of legitimacy and power within educational policy contexts.

5.1 Research Site and Participants

The research was carried out in specific public schools in South Africa, reflecting a range of contexts distinguished by differing resource availability, governance capabilities, and union involvement. The contexts served as a pertinent framework for analysing the interpretation of educational policy dialogues at the school level. Participants were intentionally selected to include key stakeholders directly or indirectly engaged in educational policy processes. The

5.2 Sampling techniques

Purposive sampling was employed to identify participants with relevant experience and expertise in school governance, leadership, and union involvement.²³ A total of sixteen participants were involved, consisting of principals (n=4), members of the School Management Team (SMT) (n=4), representatives of the school governing body (SGB) (n=4), and representatives of teacher unions (n=4). This ensured that the generated data were informative and aligned with the study's objectives.

²² U Flick, *An Introduction to Qualitative Research* (6th edn, SAGE Publications 2020)

²³ MQ Patton, *Qualitative Research and Evaluation Methods* (4th edn, SAGE Publications 2015).

5.3 Data collection methods

Data were gathered via semi-structured interviews, enabling participants to express their perceptions and experiences concerning SADTU's involvement in educational policy dialogues. Semi-structured interviews offer flexibility, allowing researchers to explore participants' responses in depth while adhering to the research objectives.²⁴

The interview guide was developed to investigate essential domains, including:

- Perceptions of SADTU's moral authority.
- Influence of SADTU in policy-related discussions and decisions.
- Experiences of union involvement in governance and leadership processes.
- Perceived tensions, challenges, and opportunities within policy dialogues.

This method facilitated the collection of comprehensive narratives, reflecting the complexity of participants' experiences and interpretations.

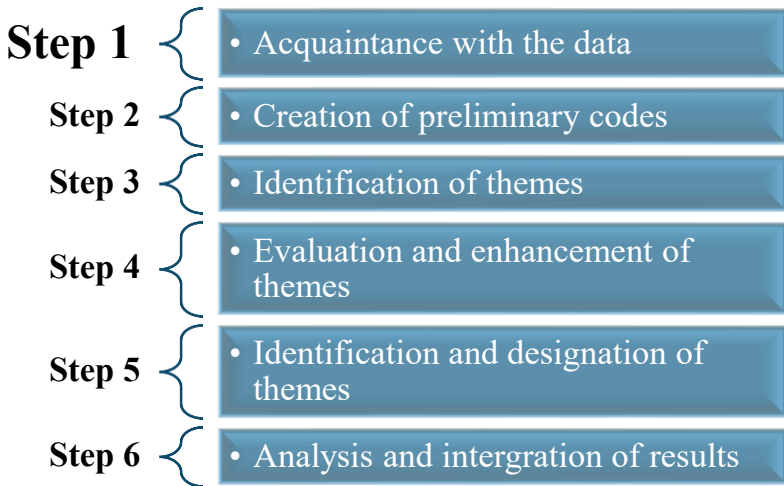
5.4 Data analysis

The data were analysed through thematic analysis, adhering to the systematic methodology established.²⁵ This method entails the identification, analysis, and interpretation of patterns within qualitative data, rendering it especially appropriate for the examination of perceptions and experiences.

The analysis comprised six essential phases:

²⁴ S Kvale and S Brinkmann, *InterViews: Learning the Craft of Qualitative Research Interviewing* (3rd edn, SAGE Publications 2015).

²⁵ V Braun and V Clarke, 'Using thematic analysis in psychology' (2006) 3(2) *Qualitative Research in Psychology* 77.



Four interrelated themes emerged from this process, illustrating participants' perceptions of SADTU's moral authority, political influence, associated tensions, and opportunities for engagement. Thematic analysis facilitated a systematic and adaptable exploration of the data, permitting both inductive insights and theoretical correspondence with Legitimacy and Power Theory.

5.5 Validity and reliability

The study maintained methodological rigor by following the trustworthiness criteria established.²⁶ Credibility is established through sustained interaction with participants and the incorporation of verbatim quotes to accurately represent genuine viewpoints. Transferability is improved by providing comprehensive descriptions of the research context and the characteristics of participants. Dependability is achieved through the maintenance of a clear and transparent record of the research

²⁶ YS Lincoln and EG Guba, *Naturalistic Inquiry* (SAGE Publications 1985).

process. Confirmability is attained by anchoring findings in the data and reducing researcher bias.

5.6 Gatekeepers considerations

The study strictly adhered to ethical principles. Participants were made aware of the research's purpose and their voluntary involvement. Prior to data collection, informed consent was secured. Confidentiality and anonymity were maintained through the following measures:

- The implementation of participant codes (e.g., P-1, SMT-1).
- Data should be stored securely, ensuring that responses remain anonymous and cannot be linked to individuals or specific educational institutions.

The research adhered to institutional ethical standards for studies involving human subjects.

5.7 Limitations of the study

The qualitative design provided in-depth and context-specific insights; however, the findings are not meant to be statistically generalizable. They offer a profound, interpretive insight into perceptions within particular contexts. The study depends on participants' self-reported experiences, which may be subject to personal biases or subjective interpretations. Nonetheless, these limitations are intrinsic to qualitative research and do not diminish the study's contribution to understanding complex social and institutional dynamics.

6. PRESENTATION OF STUDY FINDINGS AND DISCUSSIONS

Four interrelated themes were identified to enhance data analysis and interpretation. Themes illustrate the dual role of the South African Democratic Teachers Union (SADTU) as a morally grounded institution and a politically influential entity in educational policy contexts. These are (1) teacher unions as sources of moral authority and legitimacy, (2) teacher

unions as political actors in educational policy dialogues, (3) tensions and contestations in the exercise of legitimacy and power, and (4) opportunities for constructive and collaborative policy engagement. Participants were assigned codes to maintain confidentiality and anonymity, rather than using their names. Participants were designated as Principal (P1), School Management Team member (SMT2), School Governing Body representative (SGB3), and Union Representative (UR4).

6.1 Theme 1: Teacher unions as sources of moral authority and legitimacy.

The findings indicate that teacher unions, especially the South African Democratic Teachers Union (SADTU), are largely regarded as sources of moral authority due to their historical advocacy, professional representation, and dedication to educators' rights. There is a notable consensus among participant groups that SADTU's legitimacy stems from both its formal role as a union and its symbolic role as a champion of justice, fairness, and professional dignity in the education system. Participants consistently linked SADTU's authority to its function in representing and safeguarding educators. A participant elucidated:

“Teacher unions are a voice for teachers... they ensure that teachers are involved in decision-making when policies are made... and they influence education legislation at different levels.” (SGB4)

This perception illustrates both pragmatic and moral aspects of legitimacy, highlighting the union's value in representing educators' interests and its congruence with overarching principles of fairness and participation. Another participant highlighted the union's function in protecting rights and enhancing professional well-being.

“They ensure fair working environments... negotiate salaries and benefits... and make sure that decisions taken by management align with educators' best interests.” (SMT3)

The accounts indicate that SADTU's legitimacy is established through continuous advocacy, negotiation, and professional support, thereby solidifying its role as a credible institutional actor in educational contexts. In addition to representation, participants emphasized the union's function in fostering professional development and upholding standards.

“Teacher unions ensure that teachers undergo ongoing professional development... through workshops and training... helping improve teaching and learner outcomes.”
(SGB4)

Legitimacy is associated with the union's role in enhancing education, thereby broadening its moral authority from labour issues to encompass teaching and learning. This enhances the view of SADTU as both a protective entity and a developmental, professional organization. While there is significant agreement on SADTU's moral authority, the data indicates notable divergences, especially in the interpretation and enactment of this legitimacy. Certain participants indicated that the authority facilitating advocacy might simultaneously foster conditions of over-reliance and diminish professional accountability.

“Over protection and support given by the union makes some educators reluctant to take initiative... they rely too much on the union even when they are expected to perform their duties.” (SMT1)

Discussion on theme 1

Moral authority is increasingly important for understanding the role of institutional actors in contemporary education systems, especially in contexts with complex governance and competing stakeholder interests. Legitimacy Theory critically examines how teacher unions obtain, maintain, and negotiate authority in educational policy contexts. Legitimacy refers to the perception that an institution's actions are appropriate, desirable, and consistent with socially constructed norms and

values.²⁷ It is typically expressed through pragmatic, moral, and cognitive dimensions.²⁸ In educational contexts, teacher unions gain legitimacy from both their formal mandate and their historical and socio-political positioning. Post-apartheid South Africa has seen teacher unions significantly advance equity, social justice, and educators' professional rights, establishing a robust foundation for moral legitimacy.²⁹ Their historical embeddedness enhances credibility and positions them as trusted representatives in educational discourse. Teacher unions have broadened their focus beyond traditional labor issues to encompass educational quality, professional development, and systemic transformation.³⁰

Legitimacy is not fixed or universally accepted; it is dynamic, relational, and continuously negotiated within changing policy contexts. Current research indicates that as teacher unions become more involved in policy and politics, their legitimacy faces heightened scrutiny, especially when their actions appear to favor specific interests over broader educational objectives.³¹ This highlights a tension between normative legitimacy and perceived self-interest, questioning the extent to which unions align with societal and educational imperatives. The construction of moral authority in educational systems is inherently linked to power dynamics. Legitimacy Theory elucidates the foundation of granted authority, whereas Power Theory examines the mobilization and maintenance of that authority in institutional settings. Legitimacy serves as both a normative attribute and a resource that facilitates influence, affecting actors' participation in and impact on policy processes. It is argued that a multidimensional view of power, emphasizing that influence encompasses not only visible decision-

²⁷ Bitektine and Haack (n 7).

²⁸ Suchman (n 6).

²⁹ Soudien, Reddy and Harvey (n 3).

³⁰ Bascia (n 1).

³¹ Malin, Lubienski and DeBray (n 5).

making but also agenda-setting and the formation of dominant discourses.³²

The moral authority of teacher unions can be viewed as an invisible power that shapes perceptions, values, and expectations in educational systems. Unions shape shared understandings of rights, responsibilities, and educational priorities through historical narratives, advocacy roles, and professional positioning. This influence strengthens their institutional presence and legitimizes their role in policy discussions. The interdependence of legitimacy and power creates inherent contradictions. Legitimacy fosters participation and acceptance but may also expand influence, obscuring the lines between representation and control. As unions integrate further into policy processes, their moral authority may face challenges, especially when their influence is seen as disproportionate or misaligned with broader governance goals.³³ This highlights the necessity of viewing legitimacy as a negotiated and context-dependent construct, shaped by interactions between institutional actors and their environments.

6.2 Theme 2: Teacher unions as political actors in educational policy dialogues.

The findings suggest that the South African Democratic Teachers Union (SADTU) is regarded as a morally legitimate institution and a significant political actor influencing educational policy discussions and decision-making processes. There is significant agreement among participant groups that the union's role transcends advocacy, encompassing both direct and indirect influences on the formulation, negotiation, and implementation of decisions within educational contexts.

Participants consistently highlighted the union's active role in decision-making processes, especially concerning policy interpretation and implementation.

³² Lukes (n 8).

³³ Moe (n 2).

“Teacher unions influence decision-making... they workshop educators on policies and ensure that these policies are implemented correctly at school level.” (SMT1)

“They make sure that teachers are involved in decision-making when policies are made... and influence education legislation at provincial and national level.” (SGB4)

These accounts illustrate the manifestation of visible power, wherein SADTU engages directly in formal structures and processes that influence educational policy. The union asserts its presence in governance by participating, thereby ensuring that educators' perspectives are included in policy discussions.

The findings indicate that, in addition to formal participation, hidden forms of power are at play, especially regarding the union's capacity to shape organizational practices and influence decision-making processes.

“Teacher unions make sure that decisions taken from the union are implemented... they guide how things should be done at school level.” (SGB1)

“They serve as the first line of report... representing teachers in high decision-making meetings and negotiating on their behalf.” (SGB2)

The union exerts influence in agenda-setting and implementation, affecting both the decisions made and their enactment within schools. This indicates a more profound level of influence, wherein power is enacted by shaping organizational practices and facilitating interactions among stakeholders.

The findings indicate the existence of invisible power, whereby SADTU shapes stakeholder perceptions of policies, roles, and institutional expectations.

“Unions smoothen relationships between stakeholders and educators... they also drive values in the school.” (SMT2)

This aspect of power is crucial, as it functions at the level of norms, beliefs, and perceptions, influencing how educational stakeholders comprehend their roles and responsibilities. SADTU plays a significant role in shaping a cohesive organisational culture, thereby strengthening its integration within the institutional framework of schools.

While there is considerable consensus on SADTU’s political influence, participants articulated differing perspectives on its implications. Certain participants perceived this influence as both enabling and essential, especially for ensuring representation and safeguarding educators’ interests.

“They ensure that leadership considers the aspirations of educators... and that decisions are fair and aligned with policies.” (UR3)

Some individuals expressed concerns regarding the degree of this influence, indicating that it may occasionally infringe upon leadership authority and organizational autonomy.

“Sometimes unions undermine the leadership and management system... making demands that are not always realistic.” (SMT4)

“They act as a buffer, but the problem is when they defend unprofessional behaviour... educators rely on the union even when they are wrong.” (SMT2)

Discussion on theme 2

Research increasingly identifies teacher unions as key political actors in education systems, influencing policy formulation, agenda-setting, and governance beyond traditional labor relations.³⁴ This reconceptualization indicates a shift in viewing unions as not just representative bodies, but as strategic agents in complex political and institutional contexts. Teacher unions actively engage in educational policy discussions, utilizing their organizational strength, membership, and political connections to impact decision-making processes and outcomes.³⁵ Power Theory offers a critical framework for analyzing the nature and extent of this influence. It is argued that a three-dimensional framework that conceptualizes power as functioning in visible, hidden, and invisible domains, all of which are reflected in the role of teacher unions in policy contexts.³⁶ Unions participate in formal governance, policy negotiations, and consultative processes, influencing decisions through direct engagement. This influence is framed in democratic discourse as enhancing representation and inclusivity, ensuring educators' perspectives are included in policy development.

Contemporary literature indicates that union influence transcends formal participation, manifesting in subtler power dynamics. Hidden power is demonstrated through agenda-setting, as unions shape issue prioritization and the structure of policy discussions.³⁷ Teacher unions influence policy dialogue through their institutional positioning and strategic engagement, shaping both the topics of discussion and the exclusions from consideration. This aspect of power highlights unions' ability to indirectly shape policy by defining the conditions for decision-making. Teacher unions function within the realm of invisible power, influencing norms, values, and perceptions in educational systems. Unions shape dominant narratives regarding education, professionalism, and rights through advocacy, professional discourse, and historical context. Narratives influence stakeholders' interpretation of policy, comprehension of their

³⁴ Stevenson, Carter and Passy (n 13).

³⁵ Moe (n 2).

³⁶ Lukes (n 8).

³⁷ Malin, Lubienski and DeBray (n 5).

roles, and participation in governance processes. Unions act as discursive agents, shaping decisions and the frameworks for understanding those decisions.³⁸

In the South African context, the South African Democratic Teachers Union (SADTU) illustrates this multifaceted exercise of power. Its historical connection to political movements and ongoing involvement in policy processes establish it as a key player in shaping educational discourse and governance.³⁹ This positioning allows SADTU to influence various levels of the education system, from school governance to national policy. This influence can improve democratic participation and policy responsiveness but also raises issues of power concentration, control, and accountability. Research indicates that strong teacher unions in governance can lead to the politicisation of education, with policy decisions influenced by political interests over educational priorities.⁴⁰ This raises important questions regarding the balance between representation and dominance, especially in contexts where unions possess significant institutional power.

The political role of teacher unions is contingent upon the concept of legitimacy. Legitimacy Theory posits that unions' power is dependent on their perceived credibility and social acceptance.⁴¹ Legitimacy serves as a crucial resource, allowing unions to engage effectively in policy discussions and to have their influence acknowledged as valid and warranted. Legitimacy and power are interconnected; legitimacy facilitates access and acceptance, whereas power dictates the degree of influence in policy processes. This interdependence generates tension. As unions increase their political involvement, their legitimacy may face challenges, especially if their influence is seen as excessive or misaligned with wider educational goals.⁴² This underscores the ambivalent nature of

³⁸ Walker and Qian (n 16).

³⁹ Heystek and Terhoven (n 15).

⁴⁰ Moe (n 2).

⁴¹ Suchman (n 6).

⁴² Malin, Lubienski and DeBray (n 5).

union power, which is both enabling and constraining in educational governance.

6.3 Theme 3: Tensions and contestations in the exercise of legitimacy and power.

The preceding themes position the South African Democratic Teachers Union (SADTU) as a morally legitimate institution and a politically influential actor; however, the findings indicate that this dual positioning is contested and fraught with tension. The exercise of legitimacy and power occurs within complex organizational and policy environments, characterized by competing interests, role ambiguities, and uneven power relations. A key point of agreement among participants is that SADTU's influence, while frequently facilitating, also creates tensions concerning authority, accountability, and organizational control. The tensions are particularly evident in the perceived overlap between union structures and school leadership roles.

“Teacher unions can undermine the leadership and management system of the school by making unrealistic demands... sometimes they interfere too much.” (SMT4)

“There is a challenge of dual leadership... where unions defend unprofessional behaviour and this affects how the school is managed.” (SMT2)

These accounts underscore a significant organizational tension characterized by the emergence of parallel or competing centres of authority. From a Power Theory perspective, this indicates the extension of union influence beyond participatory engagement into predominant forms of control, resulting in an increasingly indistinct boundary between representation and governance. Participants expressed concerns about professional accountability, indicating that the protective function of unions might, in some cases, shield unprofessional behaviour.

“Job security is sometimes misunderstood... teachers neglect their duties because they know the union will protect them.”
(Principal-1)

“Overprotection by the union makes some educators reluctant to take initiative or perform beyond what is required.” (SMT1)

The perceptions reflect a conflict between moral legitimacy and organizational responsibility. SADTU's legitimacy, grounded in its advocacy for fairness and protection, may simultaneously be viewed as facilitating practices that compromise professional standards. In this context, legitimacy is subject to contestation, prompting inquiries regarding its congruence with overarching educational objectives. A notable source of tension pertains to communication and coordination in policy and governance processes. Participants identified occurrences of fragmented communication and misalignment among stakeholders.

“Information is sometimes received in a short space of time... this creates confusion and a breakdown between management and educators.” (Union-2)

“There is often miscommunication between the employer and employees... which affects how decisions are implemented.”
(Principal-2)

These challenges illustrate the complexities involved in policy implementation within unionized settings, where various stakeholders have divergent priorities and timelines. From a Power Theory perspective, this can be viewed as a manifestation of concealed power, wherein control over information and communication influences the comprehension and implementation of policies.

The findings reveal tensions regarding inclusivity and representation, particularly in relation to non-union members and other stakeholders.

“Non-union staff may feel suppressed when decisions taken by union representation affect them... even though they are also part of the school.” (SGB-4)

This underscores a significant governance issue: although unions represent their members, their influence may unintentionally marginalize other perspectives within the school community. This prompts an examination of the degree to which union-driven processes correspond with the principles of inclusive and democratic governance.

Despite these tensions, it is noteworthy that participants did not uniformly dismiss SADTU’s role. Their accounts demonstrate a nuanced and context-dependent understanding of its influence. Tensions were sometimes linked not only to the union but also to wider systemic and contextual factors, such as leadership capacity, resource limitations, and organizational culture.

“Sometimes the problem is not the union, but how leadership engages with the union... if there is no clear communication, conflict is inevitable.” (Principal-3)

Discussion on theme 3

Teacher unions are acknowledged as morally legitimate and influential in educational policy, yet the literature indicates that this dual role is contested and fraught with tension. Legitimacy and power operate within complex organizational and policy contexts marked by competing interests, role ambiguity, and uneven power dynamics, especially in decentralized and resource-limited education systems.⁴³ A key issue in the literature is the overlap between teacher unions and formal leadership structures. As unions broaden their roles from advocacy to governance and policy engagement, questions emerge about the delineation of responsibilities. This leads to the emergence of parallel or competing authority centers, blurring the line between representation and

⁴³ Spaul and Van der Berg (n 20).

management.⁴⁴ These dynamics complicate decision-making and may weaken organisational coherence, especially in contexts with fragile governance structures.

Power Theory explains these tensions as a result of the expanding influence of unions across various power dimensions. Visible power aids participation in formal decision-making, whereas hidden power allows unions to shape agendas and influence policy processes, often in non-transparent ways.⁴⁵ This exercise of power adds to organisational complexity; as various actors vie for influence within the same governance space. Tensions regarding professional accountability are closely linked to these dynamics. Literature indicates that teacher unions are essential for safeguarding educators' rights and advocating for equitable labor practices; however, their protective role may sometimes hinder accountability and performance standards.⁴⁶ This illustrates a contradiction in Legitimacy Theory: the moral authority legitimizing union action can also create perceptions of misalignment between advocacy and organizational responsibility. Legitimacy is contested when union actions are seen as prioritizing member protection over institutional effectiveness.

A key area of tension involves communication and coordination in policy and governance processes. Implementing educational policy is complex, necessitating alignment among various stakeholders with differing institutional logics. In unionized contexts, this complexity is heightened by the involvement of additional actors who affect the interpretation and implementation of policies. Research shows that fragmented communication, inconsistent information flows, and misaligned expectations contribute to implementation gaps and organizational inefficiencies.⁴⁷ From a Power Theory perspective, control over information and communication serves as a hidden power, influencing the understanding and implementation of policies in schools. The literature highlights significant issues related to inclusivity and representation in

⁴⁴ Moe (n 2).

⁴⁵ Lukes (n 8).

⁴⁶ Moe (n 2).

⁴⁷ Malin, Lubienski and DeBray (n 5).

governance processes influenced by unions. Teacher unions, while required to represent their members, may unintentionally marginalize other stakeholders, such as non-union staff, parents, and communities, due to their dominant role in policy discussions. This creates tensions between collective representation and democratic inclusivity, questioning how union-driven processes correspond with broader participatory governance principles.⁴⁸ The concentration of influence in a single institutional actor may limit perspective diversity in policy discussions, affecting equity and decision-making legitimacy.

Contemporary scholarship warns against attributing these tensions exclusively to teacher unions. Tensions are relational and context-dependent, arising from interactions among unions, leadership structures, policy frameworks, and systemic conditions. Leadership capacity, institutional support, socio-economic inequalities, and organisational culture significantly shape the enactment and experience of union influence.⁴⁹ Tensions reflect both the exercise of power and the structural constraints and governance challenges within education systems. The combination of Legitimacy Theory and Power Theory offers a detailed understanding of these dynamics. Legitimacy allows unions to engage effectively in governance, whereas power influences the degree and nature of their impact. When power is perceived to exceed legitimacy, tensions arise, resulting in contestation and resistance. This highlights the fragile balance between acceptance and influence, where sustainable union involvement relies on aligning legitimacy, accountability, and organizational goals.

6.4 Theme 4: Opportunities for constructive and collaborative policy engagement.

The findings indicate that, despite existing tensions and contestations, there are substantial opportunities to reframe the South African Democratic Teachers Union (SADTU) as a constructive and collaborative partner in educational policy dialogues. Stakeholder groups highlighted

⁴⁸ Walker and Qian (n 16).

⁴⁹ Spaull and Van der Berg (n 20).

that strategic alignment of union involvement with organisational goals, coupled with effective leadership, can significantly enhance democratic participation, policy coherence, and institutional effectiveness. The recognition that collaboration based on shared goals and mutual trust improves the quality of policy engagement is a significant point of convergence. A participant observed:

“They can effectively collaborate by establishing shared goals, fostering open communication, and engaging in decision-making... this helps the school move forward.”
(UR1)

Similarly, another participant emphasised the importance of structured engagement:

“If unions and management work together... they can plan, organise and support each other to improve how the school is run.” (Principal-2)

These accounts indicate that effective policy engagement involves not only participation but also intentional coordination and relational alignment among stakeholders. From the perspective of Legitimacy Theory, this collaboration enhances both normative and pragmatic legitimacy, as the involvement of unions is viewed as suitable and advantageous for the operation of the school. Participants emphasized the significance of teacher unions in promoting professional development and capacity building, essential for enhancing policy implementation.

“Teacher unions organise workshops and training... helping teachers improve their practice and understand policies better.” (SGB4)

“Through mentorship and development programmes, teachers are able to grow and contribute more effectively to the school.” (Principal-1)

These insights establish SADTU as a potential facilitator of professional learning, bridging the divide between policy formulation and classroom practice. Union involvement encompasses not only advocacy but also educational improvement, thereby affirming its role as a legitimate developmental actor within the system. Participants emphasized the significance of effective communication and inclusive engagement in improving policy dialogue processes.

“Policies must not come as a surprise... when there is communication, teachers understand and implement them better.” (SMT2)

“Clear communication channels help everyone to be on the same page and avoid unnecessary conflict.” (SMT4)

These findings underscore the importance of communication in aligning legitimacy and power. Transparent and inclusive information flows enhance accountability in the exercise of power, reducing contestation and thereby fostering trust among stakeholders. The data indicates a necessity for broader stakeholder inclusion, specifically involving non-union members, parents, and communities.

“Engaging parents and the community... ensures that decisions benefit learners and not only certain groups.” (SMT-3)

This demonstrates an understanding of educational policy dialogues as processes involving multiple stakeholders, where varied perspectives enhance balanced and contextually relevant decision-making. This indicates a transition towards more distributed and participatory forms of influence, thereby diminishing the concentration of power within a single entity. Participants noted that these opportunities depend on leadership capacity and institutional conditions. Effective collaboration necessitates leaders capable of mediating relationships, managing competing interests, and fostering environments conducive to engagement.

“The success of collaboration depends on how leadership works with the union... if there is trust and clear direction, things improve.” (Principal-3)

Discussion on theme 4

Despite tensions related to teacher union involvement in educational governance, literature highlights opportunities for constructive and collaborative engagement in educational policy dialogues. Recent research indicates that strategically engaged teacher unions can serve as important partners in promoting democratic participation, policy coherence, and institutional effectiveness.⁵⁰ This perspective indicates a transition from adversarial views of union-management relations to more collaborative governance models. This reconceptualization emphasizes shared goals, mutual trust, and structured engagement as essential for effective policy dialogue. Educational policy processes are most effective when stakeholders engage in collective purpose and coordinated action, rather than fragmented or competing agendas.⁵¹ Collaboration is a structured process necessitating alignment among institutional actors, such as school leaders, policymakers, and teacher unions, rather than just a result of participation.

Legitimacy Theory posits that collaborative engagement improves normative and pragmatic legitimacy. Teacher unions' constructive contributions to policy processes enhance their perceived appropriateness and benefits, thereby strengthening their institutional credibility.⁵² The alignment of union participation with organizational goals enhances stakeholder trust and facilitates effective policy implementation. In the absence of alignment, legitimacy may weaken, making collaboration harder to maintain. The literature highlights the role of teacher unions in professional development and capacity building, positioning them as significant contributors to educational improvement. Unions are increasingly seen as facilitators of professional learning, mentorship, and

⁵⁰ Stevenson, Carter and Passy (n 13).

⁵¹ Walker and Qian (n 16).

⁵² Bitektine and Haack (n 7).

knowledge dissemination, bridging the gap between policy formulation and classroom practice.⁵³ This role enhances legitimacy and contributes to better teaching and learning outcomes, reinforcing relevance in modern education systems.

The role of communication and coordination mechanisms is crucial for effective policy engagement. Research shows that transparent, consistent, and inclusive communication is crucial for aligning stakeholder expectations and minimizing conflict in policy processes.⁵⁴ From a Power Theory perspective, communication serves as a key site of influence, where control over information can reinforce or reduce power imbalances. Open and participatory communication processes enhance accountability and distribution of power, thereby fostering trust and minimizing contestation among stakeholders. The literature highlights the significance of inclusive, multi-stakeholder engagement in enhancing educational policy dialogues. Effective governance necessitates the inclusion of diverse perspectives, such as non-union members, parents, and communities, to ensure equitable and contextually responsive policy decisions.⁵⁵ This inclusion indicates a shift to distributed governance, where influence is shared among various actors instead of being centralized in one institution.

From a Power Theory perspective, distributed engagement signifies a shift from centralized control to participatory and negotiated influence, thereby mitigating risks linked to power concentration. This underscores the need to balance union influence with broader stakeholder participation to maintain inclusive and representative policy processes. The realization of these opportunities depends on leadership capacity and institutional conditions. Effective collaboration necessitates leaders who can manage complex power dynamics, mediate competing interests, and cultivate environments of trust, clarity, and shared purpose.⁵⁶ Leadership is essential in managing the relationship between legitimacy and power, ensuring that union involvement enhances governance processes instead of increasing tensions. Systemic factors, including resource availability, governance

⁵³ Bascia (n 1).

⁵⁴ Malin, Lubienski and DeBray (n 5).

⁵⁵ Walker and Qian (n 16)

⁵⁶ Heystek and Terhoven (n 15).

capacity, and institutional support, significantly influence the degree of collaborative engagement.⁵⁷ In under-resourced contexts, weak institutional structures may impede collaboration or lead to dependence on dominant actors, such as teacher unions. Addressing systemic constraints is essential for fostering balanced and effective policy engagement.

7. CONCLUSION AND RECOMMENDATIONS

This study analysed the South African Democratic Teachers Union (SADTU) as a moral authority and political actor in educational policy discussions in South African public schools. The findings indicate that SADTU holds a dual and dynamic role, with its legitimacy rooted in historical advocacy, professional representation, and social justice commitments both facilitating and complicating its political influence. This study demonstrates that legitimacy and power are mutually constitutive, with moral authority supporting influence, while political engagement converts legitimacy into concrete impacts on policy processes. This interplay is inherently fragile and contested. Union involvement can improve democratic participation, policy responsiveness, and professional development; however, misalignment between legitimacy and power may lead to tensions concerning accountability, role ambiguity, and organizational coherence. The tensions illustrate the negotiated and relational aspects of educational governance, emphasizing that the primary challenge is not the presence of unions, but the structure, engagement, and regulation of their influence.

The study emphasizes the necessity of reframing educational policy engagement as a collaborative process based on shared goals, clear norms, and mutual accountability. Effective governance in unionized contexts necessitates a balance between moral authority and political accountability, ensuring legitimacy does not lead to unchecked influence and that power aligns with broader educational priorities. School leaders and policymakers must adopt transformational and relational leadership approaches to foster trust, dialogue, and strategic alignment with unions.

⁵⁷ Spaull and Van der Berg (n 20).

The study emphasizes the need to clarify institutional roles and enhance coordination mechanisms to reduce role ambiguity and avoid competing authorities. Structured communication platforms and defined participation boundaries are crucial for enhancing transparency and improving policy implementation. It is essential to prioritize inclusivity in policy processes, ensuring that non-union stakeholders, parents, and communities are not marginalized in decision-making.

The findings highlight the need for increased focus on contextual and structural factors, such as resource disparities, governance capacity, and institutional support. In under-resourced environments, union influence is heightened, requiring focused initiatives to enhance institutional capacity, ensuring that union participation is constructively integrated rather than excessively dominant. This study reconceptualises teacher unions as context-dependent dual actors, with influence that is both enabling and contested. This framework emphasizes the relationship between legitimacy and power, facilitating engagement with teacher unions to promote balanced governance, democratic participation, and sustainable educational improvement.