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Editorial note:

Faculty of Humanities Teaching and Learning Colloquium 2025 (T&L Colloquium 25) hosted by the Faculty of Humanities, North-West University, South Africa took place in Rustenburg, South Africa, from September 9-11, 2025, with a rich and stimulating programme filled with inspiring keynotes, contributed papers, workshops and panels. This bi-annual colloquium brings together educators, researchers, students, policymakers, and community practitioners. The main theme of T&L Colloquium 25 was “Reimagining the Future of Humanities Knowledge and Pedagogy: Decoloniality, Technology and the Social Justice Imperative.” This special issue of the *Journal of Contemporary Society And Education (JCSE)* contains Thirteen (13) selected papers presented at T&L Colloquium 2025. Selected contributions come from within and outside of South Africa and address a wide range of issues in humanities, decoloniality, technology and the social justice.

The introductory contribution by Tshifhiwa Ignatia Mashau provides an overview of research findings and trends related to the colloquium’s focus on the role of digital humanities and technology in supporting decolonial scholarship. The author’s article which titled “Decolonising digital health promotion in African higher education institutions: A justice-oriented literature review” develops a Digital Health Justice Framework to guide equitable and culturally responsive digital health promotion in African HEIs. A research article by Eyitayo Francis Adanlawo and Mpho Chaka follows with a discussion of emerging career pathways that foreground wellbeing and sustainable development, positioning humanities graduates as key contributors to sustainable and ethical futures. The authors identify novel professional opportunities in sectors including community engagement, policy development, and social innovation. They advocate for an expanded employability paradigm that integrates humanistic knowledge with sustainable development goals, underscoring the vital role of humanities disciplines in shaping resilient, inclusive societies.

The article by Nurain Aboo Mohammed evaluating the use of QR codes as a form of assessment in teaching and learning. The author confirms the potential of QR codes as both a useful and effective medium for assessment in educational settings. Samuel Chukwudi Agunyai and Victor Ojakorotu article “Analyzing the effect of the disconnection between the curriculum and Africa’s indigenous Knowledge on effective learning” argues that Africans’ realities still encompass indigenous knowledge on various levels that can be incorporated into the continent’s school curricula.

Other articles include: Examining the Impact of Digitalization and Inequality Post Covid -19 In Africa by Phuti Ignatius Moloto and Rosinah Pillay; The Omitted Conversation: Incorporating Teacher Union Scholarship for A Transformative Educational Agenda Within the Educational Landscape. Thembinkosi Zwane Trevor, David Matsepe; Examining factors behind an achieving institution: A scenario of secondary schools in Limpopo Province by Ngwako Solomon Modiba; Assessing the role of the COVID-19 catch-up recovery programme on learner performance in EFAL by Vele RJ, Tshikota and T M Badugela; Entrepreneurial Education and Sustainable Entrepreneurship Advancing Sustainable Development Goals in South Africa Through Small Businesses by Lazarus,

M. and Beharry-Ramraj, A; Mitigating Grammatical Ambiguity In English Prepositional Phrases At Dzindi Circuit Secondary School, South Africa by Farisani Thomas Nephawe; Exploring the Usage of Metadiscourse in Research Proposals Written by Honours Students by Mzamani Steven Khosa and Ernest Kwesi Klu; and Population Ethics and its implication for Developing Countries by Onwe Peter S. and Kelechi Johnmary Ani. Policy Windows and Missed Opportunities: An Institutional Analysis of How Teacher Unions Influence (or fail to influence) National Educational Policy Formulation by Zwane Thembinkosi Trevor, Matsepe David.

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**THE OMITTED CONVERSATION: INCORPORATING TEACHER UNION
SCHOLARSHIP FOR A TRANSFORMATIVE EDUCATIONAL AGENDA WITHIN
THE EDUCATIONAL LANDSCAPE IN SOUTH AFRICA**

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Abstract

The global paradigm shift in educational transformation necessitates a reappraisal of the roles assumed by all relevant stakeholders in education, including teacher unions. Teacher unions have historically been situated within the realms of labour advocacy, engaging in the bargaining process and striving for improved working conditions for educators. However, teacher unions have been marginalized in discussions regarding long-term educational reform, as they lack representation in both school governance structures and professional management roles. This study examines the overlooked discussions surrounding the incorporation of teacher unions into school leadership structures. This study critically examines the overarching narratives surrounding educational innovation through the lens of institutional theory. This study presents a compelling argument on a global scale, asserting that teacher unions are not merely reactive entities. Instead, they hold transformative potential to reshape educational landscapes by advocating for policies that promote social equity, democratic participation, and professional development. This study, rooted in qualitative interpretive design, derives its insights from participants located in two primary schools and two secondary schools in the Gauteng Province. The findings highlight that when teacher unions are involved in school leadership, they can assist the school in transcending power oppositions to serve as advocates for inclusive and sustainable improvement. However, omissions that are systematically embedded in policy persist in undermining this potential. Consequently, this research advocates for an epistemic orientation in educational governance, positioning union perspectives as central rather than marginal in discussions of reform. This study concludes by presenting recommendations for reforming educational governance to acknowledge teacher unions as co-constructors of educational improvement, grounded in principles of social justice, contextual responsiveness, and collaboration.

Keywords: *Collaborative leadership; Educational equity; Educational governance; Educational reform; Institutional theory; Policy inclusion*

Introduction and background to the study

In the dynamic context of global educational reform, the role of teacher

unions is crucial yet frequently overlooked (Medadi & Mahdavi, 2025). Although teacher unions have traditionally been seen as advocates for labour rights and safeguards against managerial overreach,

their evolving influence in shaping broader educational policy, pedagogy, and systemic equity is still relatively underexplored in mainstream academic discourse (Bascia, 2015). This article examines the often-neglected discourse surrounding the transformative potential of teacher unions in influencing educational policy and professional management beyond conventional negotiation settings. The study aims to redefine the role of unions, viewing them not merely as stakeholders but as active participants in the co-construction of a reimagined educational agenda that is aligned with inclusive improvement (Mafisa, 2017).

Contemporary educational challenges ranging from widening inequality, the digitalization of learning, to post-pandemic recovery necessitate collaborative governance structures that move beyond traditional bureaucratic hierarchies (de Wit & Altbach, 2023). Yet, within these developments, teacher unions are perceived as either adversarial or reactionary stakeholders rather than as transformative partners. The article explores the conceptual gap by drawing upon insights from previous studies and engaging with emerging global literature on participatory governance, professional agency, and union advocacy. The role of teacher unions in the educational landscape is increasingly examined through various dimensions that intersect with expanded governance frameworks, professional autonomy, and accountability mechanisms (Symeonidis & Stromquist, 2020).

From a global perspective, extensive research indicates significant variations in the positioning of unions, both within societal discourse and policy frameworks. In Nordic countries, for instance, teacher unions have been integrated into

collaborative policymaking frameworks, contributing to curriculum delivery, equity-driven reforms, and teacher development (Medadi & Mahdavi, 2025). Such frameworks demonstrate a governance culture that values dialogical engagement and recognizes the expertise of educators as central to reform efforts. In contrast, in numerous developing nations within the global South, teacher unions are often depicted as hindrances, especially when they participate in strike actions or challenge performance-based accountability systems (Wills, 2020). This division arises from entrenched institutional and political cultures that characterize union activity in confrontational terms.

Nevertheless, recent academic discourse suggests that these perceptions are overly simplistic and do not adequately address the structural constraints and policy exclusions that unions frequently impose. In South Africa, for instance, teacher unions have been at the forefront of discussions concerning curriculum delivery, infrastructure challenges, and professional standards (Mafisa, 2017). However, their involvement is frequently confronted with political scepticism and administrative resistance, highlighting the ongoing tension between union activities and policy execution. The existing tensions are exacerbated by the power imbalance, disparities in bargaining capacities, and restricted involvement during the formal policy-making decision-making processes (Kapilima, 2020). In the current global context, particularly following the COVID-19 pandemic, there has been a marked increase in the demand for collaborative approaches to governance. The pandemic has exposed the vulnerabilities within various educational systems, both domestically and internationally,

underscoring the necessity for the involvement of diverse stakeholders in the governance and decision-making processes of schools (Hendarman, 2022). International organizations like the International Labour Organisation (ILO) and United Nations Educational, Scientific and Cultural Organization (UNESCO) have issued renewed calls for the integration of teacher unions into education recovery strategies, recognizing their essential role in advocating for safe and favourable learning environments, teacher welfare, and equitable access (UNESCO, 2021). Nevertheless, despite these appeals, national policy frameworks frequently fail to institutionalize union participation, extending beyond engagement that is merely reactive to crises.

Furthermore, the global trend towards the professionalization of teaching, as promoted by organizations such as the Organisation for Economic Co-operation and Development. (OECD), inherently necessitates the participation of unions (Fraser & Smith, 2017). Professionalization necessitates mechanisms that facilitate ongoing professional development, promote teacher autonomy, and maintain ethical standards areas in which unions possess experience and legitimacy (Schleicher, 2019). However, in the absence of structural avenues for teacher unions to play a leading role in these initiatives, the process of professionalisation continues to adopt a top-down approach, which poses a risk of alienating educators rather than empowering them. The exclusion of research pertaining to teacher unions from mainstream educational discourse also restricts the possibilities for systematic transformation (Khumalo, 2019). Although unionism is examined within the realms of labour economics and political science, its

educational significance, particularly in the contexts of school leadership, institutional accountability, and professional identity, has not received adequate scholarly attention (Msila, 2022).

This omission typically reflects an epistemic bias that tends to privilege managerial models of leadership while marginalizing grassroots perspectives (Larsson & Alvehus, 2023). Consequently, it is key to advocate for a paradigmatic shift that positions unions as proactive agents of educational innovation rather than merely as recipients or resisters of change. Institutional theory thus serves as a valuable framework for analysing such dynamics. It aids in elucidating how teacher unions, as formal institutions, both influence and are influenced by the expanded policy landscape (Vince, 2019). According to Scott (2019), institutions function within normative, regulative, and cultural-cognitive pillars, which influence the construction of legitimacy and authority. Within the institutional theoretical framework, teacher unions can be regarded as mediators of institutional change, possessing the ability to challenge normative assumptions regarding governance and professionalism.

Teacher unions engagement in educational reform should be regarded not as antagonistic but rather as an essential counterbalance to administrative dominance and technocratic rationality (Ross Schneider, 2022). Furthermore, institutional theory emphasizes the importance of legitimacy. Therefore, teacher unions gain legitimacy not solely from membership strength but also from their capacity to articulate collective interests within the established frameworks of educational equity and justice (Rajendran, 2025). In contexts where

unions are excluded from formal decision-making structures, the authenticity of the process is compromised, resulting in policy fragmentation and gaps in implementation. Consequently, reimagining education necessitates a concerted effort to engage teacher unions and perspectives within both academic and policy spheres (Stevenson, 2024).

Teacher unions must carefully balance competing interests while prioritizing the well-being of teachers and the educational outcomes for learners. However, their exclusion from strategic decision-making undermines their capacity to contribute to sustainable and contextually relevant improvement (Msila, 2022). The exclusion of teacher union scholarship from mainstream educational reform discussions represents a significant oversight and a lost opportunity for meaningful dialogue (Gavin, 2022). This obstructs a comprehensive understanding of how reform develops at the convergence of policy, professional agency, and practice. This article advocates for a re-examination of the discourse, recognizing the various roles unions fulfil in governance, highlighting their organizational strength, and incorporating their viewpoints into a transformative educational agenda.

Aim of the study

The primary objective of this forthcoming study is to thoroughly investigate the transformative capacity of teacher unions in engaging in school leadership to foster social equity, cohesion, professional growth, and effective educational reforms.

Objectives of the study

1. To explore the extent of the systematic policy neglect that

marginalizes teacher union viewpoints in school leadership.

2. To investigate the extent to which teacher unions transcend conventional labour roles and significantly enhance school leadership for ongoing educational reform.

Research questions

The study sought to answer the following key question and sub-questions:

In what ways can teacher unions redefine their approach to school leadership and engage as transformative agents in the pursuit of inclusive and practical educational reforms?

Sub-research questions

1. What systematic barriers embedded in policy continue to silence the voices of teacher unions in discussions surrounding educational reform?
2. What theories and knowledge are essential in educational leadership to acknowledge teacher unions as collaborative partners in school leadership for ongoing educational reform?

Literature review: Absent dialogues of involving teacher union in transformative educational agenda

This section outlines the literature categorized into four themes: (1) reimagining teacher unions beyond adversarial narratives; (2) the professionalization of teacher unions to enhance professional agency; (3) considering teacher unions as mediators for educational justice and equity; and (4) advancing collaborative governance by incorporating teacher union insights into

policymaking. Themes played a crucial role in shaping the empirical investigation into the experiences of teacher unions within no-fee public schools, particularly in those that are under-resourced.

Reimagining teacher unions beyond adversarial narratives

Teacher unions are often perceived as obstructive stakeholders involved in wage negotiations at both local and global levels. Recent scholarship indicates a growing recognition of the need for a pragmatic shift, acknowledging unions as significant stakeholders in educational communication and systemic transformation (Pashiardis & Brauckmann, 2020). In nations characterized by high-performing systems, such as Finland and Sweden, unions play a significant role in national policy discussions, the development of professional standards, and reforms in curricula that prioritize equity (Sahlberg, 2021). This engagement aligns with unions that have broader objectives of educational quality and equity, positioning them as significant catalysts in the reform of education rather than as adversaries.

Nevertheless, adversarial perceptions persist in narratives within certain global contexts. For instance, in South Africa, teacher unions frequently adopt a hardened stance during strike actions, portraying themselves as antagonists to educational advancement (Bertram & Alant, 2021). Research conducted by Chikoko and Jita (2018) emphasizes that these actions primarily arise from systematic exclusion, inadequate resources, and failures in governance rather than from inherent obstacles to union formation. Consequently, reimagining and repositioning teacher unions necessitates an acknowledgment of the socio-political context that influences their advocacy role.

Furthermore, organizations like ILO (2021) and UNESCO (2021) emphasize the importance of union involvement in governance structures to foster inclusiveness and to support contextually relevant educational reform initiatives. The inability to integrate teacher unions within these frameworks, particularly in the context of the post-pandemic recovery plan, highlights existing biases in governance models that favour administrative expediency at the expense of participatory governance. Therefore, reconceptualizing unions involves transitioning from a role focused solely on crisis responses to one characterized by ongoing, institutionalized involvement in the decision-making process. This shift reframes their identity from adversarial entities to indispensable co-constructors of the educational agenda.

The professionalization of teacher unions to enhance professional agency

The global trend towards the professionalization of teaching, driven by the OECD, necessitates a strong engagement of teacher unions (Schleicher, 2019). Thus, making professionalism not solely about credentialing but entails strengthening the agency of teachers, continuous professional development, and ethical practices. This is significant because these are the domains in which unions have traditionally held both expertise and organizational infrastructure. For instance, in Canada, teacher unions play a significant role in establishing professional standards, thereby ensuring that the perspectives of teacher unions contribute to the shaping of school improvement initiatives (Bscia, 2018).

In a similar vein, in Singapore, unions are collaborating with educational ministries to advocate for long-term professional

learning initiatives that align with educational priorities while respecting teachers' professional autonomy (Nazeer-Ikeda & Asada, 2025). In contrast, the professionalisation processes in South Africa frequently marginalise teacher unions, thereby reinforcing hierarchical, top-down accountability models that regard teachers merely as implementers of policy. It is essential for teachers to be involved in the design of these policies, as they possess a deeper understanding of the needs related to school leadership (Sayed & Motala, 2021). The South African Council of Educators (SACE), for example, delineates the professional standards and guidelines independently of union involvement, thereby constraining opportunities for authentic and individualized teacher agency.

From an institutional perspective, excluding unions from professionalization efforts presents a significant risk of undermining the normative and cultural cognitive pillars essential for institutional legitimacy (Scott, 2019). Therefore, teacher unions represent a collective effort towards professionalization by advocating not only for improved working conditions but also for a pedagogical vision that reflects the contextual realities. Consequently, their organizational knowledge plays a crucial role in resisting technocratic reforms that prioritize standardization at the expense of contextual relevance. Thus, the integration of a union perspective is not merely optional; it is essential for fostering a genuine and authentic professional environment that empowers educators rather than dividing them.

Considering teacher unions as mediators for educational justice and equity

Unions are vital advocates for educational social justice when global crises like COVID-19 increase inequities. Research shows that unions have advocated for equitable resource allocation, positive school settings, and comprehensive learner support services, especially in underprivileged communities (ILO, 2021; UNESCO, 2022). United States teacher unions like the Chicago Teacher Union have expanded their bargaining demands to include housing, racial equity, and healthcare, linking educational advocacy to social justice (Weiner & Compton, 2020). The Norwegian Union of Education extensively promoted fair digital access during the remote learning program (Noble, 2023).

In South Africa, major teacher unions including the South African Democratic Teachers Union (SADTU) have raised equality concerns amid political uncertainty. These include unsafe school infrastructure, poor sanitation, and unequal digital learning resources (Spaul & Pretorius, 2020). Institutional resistance sometimes undermines teacher unions, highlighting bureaucratic policy cultures that value bureaucratic compliance above equity-driven reforms. Excluding teacher union voices fragments policy, weakening equity-oriented and holistic strategies. Thus, institutional theory shows that teacher unions must be recognized as legitimate stakeholders pushing for systemic equity, not secondary stakeholders. Teacher unions protect instructors' interests and are important stakeholders in the educational environment in a world of growing inequality.

Advancing collaborative governance by incorporating teacher union insights into policymaking

To create resilient and democratic education systems, collaborative governance models must intentionally include different stakeholders, including teacher unions. Hierarchical and technocratic models cannot solve complex issues including innovative curriculum development, post-pandemic recovery, and inclusive leadership (Ansell & Gash, 2018). Unions are integrated into governance systems in Finland and Scotland through social dialogue frameworks, which enable collaborative policy formation rather than resistance (OECD, 2020; Sahlberg, 2021).

These models show that unions in school leadership lead to more lasting reform, teacher inclusiveness, and better education. Reforms that exclude people from strategic decision-making generally lack legitimacy, school-level resistance, and implementation fidelity (Chikoko & Jita, 2018). The fractured connection between union and educational authorities in South Africa sometimes creates governance models that complicate accountability and undermine coherent reform trajectories (Sayed & Motala, 2021).

Unless participatory governance models are prioritized, the New Public Management paradigm, which prioritises privatisation, managerialism, and competition, could further suppress teacher unions (Pashiardis & Brauckmann, 2020). Institutional theory stresses normative alignment, arguing that educational legitimacy is created through broad and inclusive conversation that includes a variety of stakeholder perspectives. Teacher union scholarship must be included in policymaking to create

egalitarian, resilient, and democratic educational systems.

Theoretical framework underpinning this study: *Institutional theory*

The institutional theory, as articulated by Scott (2019), provides a comprehensive analysis of power, facilitating a better understanding of how institutions function within fields characterized by deeply entrenched norms, belief systems, and standards. Institutional theory is closely linked to the analysis of teacher unions, which serve not merely as external disruptors but as established stakeholders in influencing, negotiating, and at times contesting the landscape of educational governance (Austin & Jones, 2024). Institutional theory suggests that institutions are significantly influenced by their environment, which is supported by three foundational pillars: the regulative pillar, the normative pillar, and the cultural-cognitive pillar (Ramphal, 2024).

Firstly, the regulative pillar indicates that institutions are structured by formal rules, sanctions, and coercive mechanisms that dictate and restrict behaviour (Huemer, 2021). Within the framework of teacher unions, this encompasses existing legislation like the South African Schools Act (SASA) and the collective bargaining agreements that define the relationship between unions and the state. Secondly, the normative pillar encompasses the values, standards, and norms that delineate what is considered desirable within a specific domain (Marianno, 2021). Teacher unions operate effectively when they advocate for professional ethics, championing equity and democratic governance practices within educational systems. Thirdly, the cultural-cognitive pillar conceptualizes institutions as frameworks of shared meanings and beliefs that confer cognitive

legitimacy to organizational behaviour (Walker & Lloyd-Walker, 2024). Teacher unions play a significant role in shaping the cultural and cognitive environment that influences perceptions of teacher professionalism, school leadership, and the authenticity of governance processes.

Through these pillars, institutional theory elucidates how teacher unions both adapt to and actively seek to transform the institutional logics that underpin educational governance and management (Karlsson, 2024). Within this theoretical framework, teacher unions are conceptualized not merely as reactive agents but as institutional entrepreneurs (DiMaggio, 1988)—stakeholders capable of instigating institutional change by mobilizing resources, challenging dominant norms, and reframing issues. Unions apply influence through regulatory engagement and participation in formal governance structures, legislative advocacy, and bargaining councils. They also employ normative influence by promoting values of equity, professional independence, inclusivity, and democratic involvement in school governance (Moss & Mitchell, 2024). Additionally, they shape cognitive frameworks by redefining professional standards, government legitimacy, and leadership expectations through training programs, public discourse, and campaigns. Recognizing teacher unions as institutional stakeholders necessitates an analytical approach to examine both their enabling and disabling effects within the frameworks of school governance (Noble, 2023).

Teacher unions play a vital role in fostering institutional resilience by maintaining democratic governance structures and professional standards, particularly during times of policy constraints and crises (ILO,

2021). Conversely, teacher unions serve as catalysts for institutional change by challenging exclusionary practices and prompting the reconfiguration of power relations within educational institutions (Maharaj & Bascia, 2021). This dual role positions teacher unions as crucial for understanding both the continuity and transformation of school governance and professional management practices (Msila, 2022). Consequently, institutional theory offers a thorough and multifaceted framework that is particularly effective for examining critical inquiries. In contrast to simplistic conflict models, institutional theory encompasses a diverse array of domains within organizations (Jupille et al., 2022). It recognizes the intricacies of organizational complexity, the multitude of factors influencing governance structures, the potential for both stability and change, and the interconnections among regulatory frameworks, cognitive beliefs, and normative commitments (Dimingu & Mogaji, 2024). By employing institutional theory, this study circumvents simplistic interpretations of teacher union behaviour, instead embracing a thorough, critically engaged analysis that is sensitive to context and emphasizes both agency and structure, as well as legitimacy and power (Eitrem et al., 2024).

Research methodology

Research design: an interpretive research paradigm was chosen to prioritize the lived experiences, perspectives, and institutional realities of key educational stakeholders (Creswell & Poth, 2018). This framework allows us to advance from mere descriptive accounts to a critical examination of the institutional logic that influences governance and management behaviors. Thus, the study employed a multiple case study approach (Yin, 2018), allowing for an

in-depth exploration across various no-fee public school settings where the presence of teacher unions is significant yet varies in its manifestation.

Research site and sampling: The research was carried out in two primary schools and two secondary schools in the Gauteng Province. All the schools were non-fee-paying institutions situated within the township context of South Africa. Purposeful sampling was conducted through active engagement with teacher unions at both governance and management levels. This approach considered variations in governance performances, professional management, and the accessibility and willingness of participants to engage actively with the subject matter (Patton, 2015). Consequently, school principals, educators involved in school governing bodies (SGB), those part of the school management team (SMT), and educators affiliated with teacher unions were chosen for data collection. In total, 16 participants were interviewed, which facilitated triangulation across various hierarchical levels and positions affiliated with unions.

Data collection: The primary method employed for data collection involved semi-structured interviews conducted in person, which allowed for depth, confidentiality, and enhanced reflections (Osborne & Grant-Smith, 2021). Interviews were conducted with primary and secondary schools in the Gauteng Province following a protocol that was consistent with the institutional pillars. The interviews were audio-recorded after obtaining consent and were transcribed verbatim for thorough analysis. Additionally, a thorough examination of documents was conducted, focusing on the

meeting minutes of the SGB and SMT, as well as the union constitutions and policy statements (Virella & Woulfin, 2024).

Data analysis: The data analysis involved a thematic approach that facilitated inductive reasoning, progressing through a process that included familiarization with transcripts and documents (Naeem et al., 2023). The creation of codes guided by empirical data and theoretical constructs, along with thematic categorization that emphasizes patterns of union influence on governance and management. Data were managed utilizing ATLAS.ti to improve systematic coding, pattern recognition, and retrieval (Smit & Scherman, 2021).

Trustworthiness and rigor: The study's trustworthiness and rigor were established through the implementation of multiple case studies, as outlined by Lincoln and Guba (1985). This included enhancing credibility via member checking, prolonged engagement, and the triangulation of interviews, observations, and documents. Transferability was attained through the detailed description of context and the selection of participants to enhance comprehension of applicability beyond the evident cases. Dependability was established by maintaining audit trails that document methodological decisions, analytic memos, and the framework employed. Lastly, confirmability refers to the practices implemented to mitigate researcher biases, which include notetaking during interviews and engaging in peer debriefing (Ahmed, 2024).

Ethical consideration: Ethical clearance was obtained from the University of Johannesburg and the Gauteng Department of Education to conduct interviews within the school setting. Participants were informed of the objectives of the study, as well as their voluntary participation and the

right to withdraw at any time without facing any consequences. Written informed consent was secured (Millum & Bromwich, 2021). Pseudonyms were employed to safeguard anonymity and maintain confidentiality. We also ensured that sensitivity was exercised, considering the potential nature of union-related discussions, thereby ensuring that participants were not placed at risk of retaliation or professional disadvantage (Lahman et al., 2023).

Discussion of findings

This study identified several themes to explore how the research aims and objectives were achieved, as well as how the primary and secondary research questions were addressed. These themes are aligned to regulative, normative, and cultural-cognitive pillars of institutional theory in that "unspoken conversations and policy bars" are tied to the transformation policy agenda within South African Schools Act. "Teacher unions as instruments of social justice" is a clear manifestation of the normative pillar. This explicit connections allow the institutional theory more relevant within the domain of educational transformation that necessitates a reappraisal of the roles assumed by all relevant stakeholders in education, including teacher unions.

Themes that emerged for this study
• Unspoken conversations and Policy Bars
• Teacher Union as Instruments of Social Justice and Parity
• Towards Epistemological Presence in Educational Transformation

Key: Principal of school A=PSCH-1; educator within the SMT of school B=SMT-2; educator within the SGB of school C= SGB-3, and educators of

school D associated with unions are designated as Unionist-4.

Theme 1: unspoken conversations and policy bars

Despite the international advocacy for inclusive governance promoted by UNESCO and the ILO, most national policy frameworks still regard teacher unions as peripheral stakeholders, involving them primarily during labour disputes rather than recognizing them as ongoing partners in educational reform (UNESCO, 2021; ILO, 2021). Larsson and Alvehus (2023) indicate that a bureaucratic oversight reflects a significant exclusion that systematically suppresses teacher union voices in decision-making processes. They argue that dominant managerial models prefer technocratic rationalities over inclusive and participatory justice, thereby displacing altern

ative knowledge systems, particularly those rooted in teacher agency and collective voice. In South Africa, the exclusion arises from a policy framework that fails to institutionalize meaningful union participation in planning, reform, and monitoring. Khumal (2019) and Msila (2022) assert that the lack of formal pathways for teacher union engagement places them in a reactive role, where their contributions are expected primarily during conflicts, rather than in shaping daily governance and strategic changes within schools.

From the perspective of institutional theory, Schoot (2019) emphasizes that legitimacy in policy influence encompasses not only regulatory aspects but also normative and cultural cognitive dimensions. Therefore, without recognition of teacher unions as epistemic stakeholders, their contributions to policy

are delegitimized, diminishing their capacity to advocate for an inclusive reform agenda. Rajendran (2025) further states that stakeholder legitimacy arises not merely from representational numbers but from the sustained ability to articulate collective interests within justice-oriented institutional frameworks. These insights align with participant observations, highlighting tensions regarding union involvement in school leadership. One member of the SMT remarked that *"Overprotection and support provided to educators by the teacher union have led to our educators becoming spoiled..."* (SMT-1). A principal echoed this sentiment, stating that *"Teacher apathy, indolence and despondency are not painstakingly reprimanded... all in the name of job security"* (Principal-1). A member of the SGB noted that *"Challenges that may arise involve the constant argument and bickering of the union to stand for and protect members for their wrong behaviour"* (SGB-2). These voices indicate the underlying tension in union-school relations, highlighting that the protective mandate of teacher unions can be counterproductive.

Such overprotection may obscure underperformance and impede the effectiveness of disciplinary procedures, thereby blurring institutional boundaries, fostering parallel lines of authority, and undermining leadership's corrective mechanisms. Unions are viewed not as collaborative agents of professional accountability, but as facilitators of a culture that supports freedom contracting in school reform initiatives. Thus, this highlights a significant dilemma that schools encounter, wherein unions are essential yet occasionally misaligned. The exclusion of union inclusion in policy and governance perpetuates a cycle of mistrust,

fragmented leadership relations, and reactive engagement. The exclusion of teacher union perspectives diminishes democratic accountability and compromises the authenticity and sustainability of educational reform. For unions to transcend this paradox, policy frameworks must acknowledge and embrace their dual role as enablers and custodians of labour rights and professional standards, including transformation.

Theme 2: Teacher unions as instrument of social justice and parity

A decisive reassessment of teacher unions transcends their traditional and widely known role as advocates for labour rights, underscoring their potential as powerful stakeholders of social justice and equity, especially in contexts characterized by systemic inequalities. Teacher unions, particularly in suppressed settings, have evolved into significant entities that advocate for equality and fairness in resource distribution, enhanced teacher well-being, and the establishment of safe and supportive learning environments (Fraser & Smith, 207; Hendaran, 2022). As schools confront the daily realities of education and learners, teacher unions occupy a unique position to address the longstanding inequalities that often remain obscured by state-led reforms. This unique stance allows unions to address emerging issues, from a lack of funding to increased socio-political exclusion.

In the international landscape, countries such as Canada and Singapore highlight the crucial role teacher unions play in promoting equity within educational contexts. In these countries, unions are regarded as significant stakeholders in developing long-term professional pathways aimed at empowering teachers while advancing equity and independence

(Bascia, 2018; Nazeer-Ikeda & Asad, 2025). These partnerships demonstrate the acknowledgment that teacher unions, when engaged constructively, can contribute not only to securing labour rights but also to the broader discourse on educational goals related to social justice and general inclusion.

However, this role is complicated by hierarchical and adversarial approaches evident in the South, where teacher unions are sometimes perceived as obstacles to progress due to their resistance to performance-based accountability frameworks (Wills, 2020). Although this hindrance is framed negatively, Chikoko and Jota (2028) contend that the tension arises not only from an inherent position to reform but also from the systematic exclusion that unions face within the array of school governance. Teacher unions possess the ability to challenge centralized power, serving as counterbalances to top-down decision-making. They provide alternative visions rooted in the authentic experiences of educators and learners.

The participant's alignment with scholarly thought highlighted the essential role of teacher unions in promoting social justice and professional equity within the school environment. SGB-4 observed that *"teacher unions serve as a voice for educators in school governance and professional management, thereby influencing education legislation."* This underscored the evolving recognition of unions not only as representatives in labour disputes but also as significant stakeholders in educational governance, thereby influencing policies that affect both educators and learners. SMT-4 stated that *"the primary function of a teachers' union is to serve as a representative for teachers, facilitate negotiations, and safeguard*

teachers against unjust dismissals or grievances". This insight reinforces the role of unions in ensuring that the rights of educators are safeguarded, while also positioning teacher unions as agents in the governance processes that shape educational landscapes. Furthermore, teacher unions are recognized for their diverse contributions to professional empowerment and development. SMT-3 stated: *"They encourage high teaching and leadership standards... provide a platform for teachers to engage in decision-making with policymakers."* This statement reveals that the role of unions extends beyond mere defence; they also facilitate professional growth and ensure that teachers are informed about policy changes and actively involved in their design and shaping.

In this manner, teacher unions may move beyond their conventional advocacy role and serve as platforms for enhanced participation in collective decision-making, the promotion of professional standards, and the advocacy of policies. The participants emphasized the increasing moral authority and epistemic role of teacher unions, positioning them as advocates for the protection of teachers' rights. Trade unions are regarded as important agents for transformation, fairness, transparency, and inclusion, advocating for the collective interests of educators by striving to create an equitable educational system for all. The persistent involvement in shaping education reforms further highlights their potential as tools of social justice and equity, amplifying the voices of those affected by educational inequities.

Theme 3: Towards epistemological presence in educational transformation

The suppression of teacher union scholarship in educational discourse

highlights a notable epistemological omission, while administrative logic frequently undermines professional agency (Gavin, 2022). This trend has resulted in the widespread perception of under-theorizing teacher unions as contributors to knowledge and agents of educational reform, despite their involvement in educational, curricular, and governance structures. Stevenson (2024) proposes a paradigm shift those positions teacher unions not as adversaries but as equal stakeholders in shaping educational futures. This reimagination necessitates a transformative policy and a novel approach that embraces alternative forms of knowledge production arising from union activism. This development would challenge the prevailing narrative that characterizes teacher unions as defensive stakeholders, positioning them instead as significant contributors to systemic transformation. Institutional theory provides a robust framework for understanding how teacher unions, as formalized institutions, navigate and reshape normative policy structures (Vince, 2019).

Teacher unions thus become sites for contestation and reconfiguration within the school governance regime. Their presence is significant in the post-pandemic context, where questions arise regarding educational justice, systemic resilience, and digital inclusion. Thus, participants expressed views that align with this scholarly perspective, underscoring the role of teacher unions in asserting epistemological agency within school governance and educational reform. SGB-2 stated that *"They ensure effective leadership practices are maintained, while simultaneously preventing any misuse of power."* Thus, ensuring that there is an understanding of teacher unions as active

participants in maintaining democratic leadership practices within schools, positioning them as significant contributors to upholding ethical standards and governance. SMT-3 asserted that *"Unions... influence decision-making through consultations and participation in school governance structures."* This also underscored the unions' increasing epistemic presence, not only as advocates for teacher rights but also as significant stakeholders in the development of policies and processes that shape school leadership and governance.

Another participant noted that teacher unions significantly influence teacher welfare, stating that *"Teacher unions also improve the lives of teachers in the workplace by... influencing the adoption and implementation of policies that teachers believe will better or enhance their working conditions."* (SMT-1). This statement demonstrates that unions play a critical role in advocating for policies that reflect the realities and needs of teachers, thereby contributing to a more equitable educational environment. Through their involvement in governance structures, unions are gradually becoming legitimate stakeholders in shaping both practice and policy, which enhances their epistemological visibility in the educational policy landscape. However, notwithstanding the positive narratives, some concerns regarding potential conflicts were raised by a few participants. One participant from the SGB remarked, *"Unions prioritize the interests of teachers over those of learners and parents, even when decisions made impact these groups"* (SGB-4). Another SMT member expresses concern regarding the political dynamics surrounding union involvement, stating, *"Conflict of interest where unions would impose their own agenda on the schools"*

(SMT-4). These concerns highlight the challenges unions encounter in balancing the needs of educators with those of the broader educational community, suggesting that the increasing epistemic presence may occasionally be perceived as disruptive rather than self-serving.

Despite these concerns, the overall conversation indicates a shift in perceptions, with unions evolving from marginal stakeholders to legitimate stakeholders in school leadership. Their involvement in decision-making is deemed essential and positively influential, thereby impacting both practice and policy. This epistemological development indicates a significant transformation in educational governance, wherein unions are recognized not only as defenders of workers' rights but also as equal stakeholders in the collective knowledge and wisdom that propel educational improvement. The expansion of the epistemological boundaries of education transformation to incorporate teacher unions as legitimate stakeholders of knowledge is essential for achieving a more inclusive and equitable educational system.

Conclusion and recommendations

This study analysed the transformative potential of teacher unions in redefining school leadership and their significant contribution to educational reform. This study, grounded in institutional theory, challenges the prevailing perceptions of teacher unions as solely labour-driven entities, positioning them instead as significant stakeholders capable of influencing inclusive, democratic, and socially just education systems. Three interconnected themes emerged from the interviews with principals, SMTs, SGB members, and teacher union members: (1) *Unspoken conversations and Policy Bar*; (2) *Teacher Union as Instruments of Social*

Justice and Parity, (3) *Towards Epistemological Presence in Educational Transformation*. These findings underscore the institutional reluctance and policy neglect that persistently marginalize union perspectives, despite their evolving role and increasing significance in discussions of school leadership.

The study reveals a paradox in which unions, despite being structurally integrated within the educational system, are epistemically excluded from discussions on school governance and improvement. This exclusion not only perpetuates historical inequities but also impedes the education system by limiting valuable insights into contextualized practice and effective leadership. This conclusion advocates for the reconceptualization of teacher unions, viewing them not merely as external stakeholders but as integral co-stakeholders in professional learning, educational vision, and school governance.

The following recommendations are presented:

Recommendations for policy

The policy framework in schools should be redefined to formally incorporate teacher unions in educational leadership, extending beyond their traditional role of collective bargaining. This entails a review of legislation, including the South Africa Schools Act, and the presentation of policy guidelines that restrict union participation to reactive functions. To this end, for teachers unions for enhancing policy literacy and promoting research a concrete mechanisms including union-academic partnerships, joint policy brief development, secondment programs for unionists to education departments are recommended.

Recommendations for educational leadership

Facilitated structural collaboration should occur between SMTs, SGBs, and union representatives through collective and joint leadership forums, allowing for mutual agenda setting and co-construction of reform policies.

Recommendation for the teachers' union

Encouragement for internal union reform should focus on strengthening members' leadership capacity, promoting a transformative rather than purely reactive engagement with educational systems, and enhancing policy literacy. Promotion of research and scholarship in collaboration with unions is essential for establishing epistemic authority and generating evidence-based positions on school improvement and equity.

Suggestions for future studies

Intensified studies are necessary to examine the ongoing effects of union-engaged school leadership on learner outcomes, teacher morale, and institutional change. Comparative studies should be conducted across regions or provinces to reveal how contextual differences shape union leadership dynamics and responses to policy.

By repositioning teacher unions as transformative stakeholders in education rather than merely labour stakeholders, this study advocates for an intentional dismantling of institutional barriers and epistemic silences. A participatory model of educational leadership is essential for achieving equity-driven reform in post-apartheid South African schools.

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