

Article

Digital Learning in the UK: Sociological Reflections on an Unequal Marketplace

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Abstract: Focusing on the UK context, and drawing on freely available information about online learning and the underlying commercial agreements between institutions, Massively Open Online Course (MOOC) platforms and Online Program Management (OPM) companies, this article shows how digitization and universities' global expansion strategies are involved in forms of transnational marketization. In particular, the article shows that the online learning marketplace in the UK shows signs of segmentation, with 'premium' offerings in the high-to-middle tier targeting socially advantaged students-as-consumers, and a bottom region of low-ranking institutions drifting towards low-grade 'unbundled' provision that targets middle-to-low income groups. The article argues that the current global landscape of online education is a shifting, unequal market place, and that more research is needed on how different groups from a range of socio-economic backgrounds successfully or unsuccessfully navigate an increasingly fragmented and 'unbundled' educational terrain.

Keywords: online learning; marketization; MOOCs; Online Program Management; unbundling

1. Marketization and Digitization

The topic of marketization has received a great deal of attention and has informed an important debate in higher education research (Ball 2008; Ball and Vincent 2001; Brancaleone and O'Brien 2011; Kenway et al. 1994; Naidoo 2003). While market-oriented economic logics have had a considerable impact on public governance over the past three decades, higher education remains a very hybrid context where 'traditional' market rules do not quite apply. This is largely caused by the ongoing role of subsidized tuition, public sources of research funding, and walled gardens of academic elite designed to deter competition (Marginson 2013). The latest manifestation of this quasi-marketization trend is a tendency to 'unbundle and rebundle' provision, by establishing partnerships with for-profit actors and using technology to offer low-cost digital education that targets the large pool of aspiring 'missing middle' students around the world, i.e., middle-to-low income groups who may have recently lifted themselves out of poverty (Christiaensen and Todo 2014), but still lack the social and material capital for traditional academic life, and may therefore be targeted by alternative forms of provision such as part-time, distance and digital (Mabizela 2018).

Unbundling, understood here as the breaking up and reconfiguration of education enabled by ubiquitous access to information and communication technologies, is a rather old concept, very much established in a number of industries: Broadcasting and media, software, banking and legal services. The concept made a short-lived appearance in the higher education discourse in the 1970s (Wang 1975), but only recently rose to much higher prominence (Barber et al. 2013) as the result of two drivers: A more assertive push towards marketization, and the growing role of digitization since the turn of the century in reorganizing patterns of provision, as universities experiment and partner up with third parties to offer 'choice' in the guise of Massively Open Online Courses (MOOCs), online degrees and short courses, to expand part-time and asynchronous models, thus, reaching out to 'unconventional' pools of potential students (Robertson and Komljenovic 2016a; McCowan 2017).

Unbundling has been framed as a 'solution' to the current crisis in higher education (Craig 2015), as institutions compete for local and international students and engage in frantic cross-national expansion, while experiencing rapid technological change and the precarization of academic labor. Unbundling is also inextricably related to the commercialization of distance education. While distance education was originally driven by an inclusive ethos, i.e., using mail first, and then information and communication technologies to bring education to underserved student populations, it rapidly became one of the main tools in the service of market expansion (Feenberg 2017; Sumner 2000). The foremost indicator of this commercial approach is the size of the Online Program Management (OPM) market. OPM companies are private providers that help universities develop online courses that target non-traditional student populations. They are often divisions of large vendors that operate on the global stage, such as Pearson Online Learning Services and Informa, but smaller players are also present. These private entities negotiate deals with institutions based on two different business models: A revenue sharing one where the private partner invests its own funds to develop a course, in exchange for a share of the tuition revenues over a long period (usually a decade); and a fee-for-service model in which individual 'unbundled' services are purchased by universities through upfront fees, leading, in theory, to more flexibility and responsiveness for all parties (Lieberman 2017). In 2015, the OPM market in the US was worth an estimated \$1.1 billion (Straumsheim 2015). Similar estimates for other national contexts are unavailable but, as the information discussed here shows, OPMs are very much active in the UK market. It should be also noted that peer-reviewed research about the OPM market and its growing role in the marketization of higher education is currently absent.

As for MOOCs, they are also part of the evolutionary trajectory of distance education, even though they were originally framed as a disruptive break with the past and a stepping stone towards the democratization of knowledge (Pappano 2012). Indeed, several critical observers described this framing as problematic and oblivious of the lessons accumulated through distance education and other open educational practices with long and varied histories (Baggaley 2014; Knox 2014). MOOCs started off as online courses with unlimited participation underpinned by principles of openness and connectedness (so called C-MOOCs), but rapidly evolved into a series of business ventures (X-MOOCs) involving universities and a select group of digital providers such as the US-based Coursera and EdX, and the UK-based Futurelearn. Soon after their appearance, MOOCs experienced a 'backlash' of sorts when concerns were raised about the low or highly fluctuating attrition rates (Jordan 2015; Perna et al. 2014), and by the homogeneous sociodemographic composition of participants, who belonged overwhelmingly to the privileged middle classes (Hansen and Reich 2015; Stich and Reeves 2017; Rohs and Ganz 2015). The MOOC experiment showed that real life inequalities are largely replicated online, with the only difference being an added cross-national dimension of scale at the point of entrance, not matched by meaningful educational achievement at the point of exit. More expressly political critiques of the MOOC phenomenon are also available, with their emphasis on automated provision dissected to reveal a strategy for the 'revolutionising of the means of production and the disciplining of academic labour' (Hall 2015, p. 280).

In this article, I attend to the intersection between unbundling and digitization described so far, drawing on sociological research on educational quasi markets. Before introducing the main argument, it may be helpful to highlight a couple of points related to the (unequal) ways in which the digital unbundling of education is currently unfolding.

Firstly, 'centrifugal' forces are pulling educational provision apart along commercial and digital lines, but a parallel tendency towards stronger integration is also visible. This is especially the case for the most prestigious and historically advantaged institutions, i.e., those that set the 'gold standard' other universities have to measure up to (Marginson 2016; McCowan 2017). This is arguably the case in the UK where, for example, the recent lifting of the student recruitment cap highlighted a distinctively stratified scenario, with the elite Russell Group institutions showing a certain reluctance to expand domestic undergraduate provision (Ratcliffe and Shaw 2017). This chimes

with the Australian experience, where the lifting of the recruitment cap in 2012 had mixed effects on the system, leading to higher costs and concerns for the low prior attainment associated with uncapped student intake (expressed by the most high-ranking universities), and fueling anxieties over the quality of alternative, often digital, provision offered by new market entrants (Shaw 2014).

Secondly, while domestic provision appears to be a relatively mixed picture that reflects local dynamics of institutional stratification (e.g., in UK and Australia), official UK data on Trans-National Education (TNE) consistently shows that most UK universities, irrespective of where they are in the rankings, actively engage in international expansion, with postgraduate distance learning playing a particularly important role (Garrett 2015). In this regard, Africa and South America are experiencing the largest year on year growth in TNE students, while numbers in Asia seem to 'tail off' as large investments in local higher education begin to alter enrolment and mobility patterns (Boe 2018). Of particular interest, in this regard, is the role of private actors and a growing cadre of mediators, educational migration agencies and consultants, working as part of loose networks involving Western Universities for the creation of 'frontier markets' in the global South (Robertson and Komljenovic 2016b). These expansionary strategies are fueled by a strong demand for higher education and, in turn, by the dreams of the aspiring middle classes in those countries. This state of affairs has been described as problematic, as universities and private actors capitalize on aspirations which are bound to hit the reality of a dysfunctional global economy, where the relationship between jobs, education and income is not quite as linear as it was thought to be (Brown et al. 2011). Indeed, McCowan (2017) notes that the increasingly de-regulated (unbundled) provision in the global south (e.g., Brazil) resulted in staggering increases in enrolments among the previously excluded lower middle classes, but did little to alleviate local inequalities, given the low level of recognition associated with the 'new' degrees.

2. Methodological Note

Having introduced the guiding assumptions that underpin the article, the focus will now shift to the analysis of the digital education marketplace in the UK. The analysis of online provision involving higher education institutions and private companies was easily carried out by gathering data freely available on the internet. In this sense, the article attempts something like a 'critical market analysis' of digital education. The aim was to describe the current landscape of digital education on its own terms: A marketplace in a state of flux. While the article adopts a conceptual perspective appreciative of the socio-economic life of global higher education, replete with market-making performances and networks (Komljenovic and Robertson 2016), the actual empirical work amounted to intelligence gathering from non-academic sources, such as institutional and corporate websites, higher education media outlets and 'ed-tech' blogs. Indeed, this exercise was the only way to collect information about online provision in the UK, as systematic data about this area is not currently available. A request for such data was sent to HESA, the UK's Higher Education Statistics Agency, with the reply confirming that, at present, it is only possible to identify 'distance learning', which however has a much broader definition. The information presented in the next section documents the market dynamism between universities and private entities, pointing to more complex processes of educational segmentation worthy of sociological attention. The sources were identified purely on the basis of convenience in relation to the key aim: To cast some light on the intersection between digital education and marketization. These are as follows:

- University websites of 127 UK institutions. The 127 institutions were chosen from an existing analysis of distinctive clusters of higher and lower status universities (Boliver 2015). This categorization will be described in the next section.
- Corporate websites of OPM companies: Pearson, Kaplan, Informa, Rite Education Associates, Laureate Education, CEG Digital, Wiley.
- MOOC platforms and search engines listing courses developed in collaboration with UK universities: EDX, Coursera, Futurelearn, Class Central.

- Higher Education online outlets and 'ed-tech' blogs: Times Higher Education, Inside Higher Education, The Atlantic Education, EdSurge, E-Literate.

3. Market (dis)Order: Online Learning in the UK Context

In this section, I will use an existing model of four distinct groups emerged from a cluster analysis based on five dimensions of status differentiation, relating to 127 UK institutions: Research activity, teaching quality, economic resources, academic selectivity, and socioeconomic student mix (Boliver 2015). Of course, the stratified nature of UK higher education can be easily evinced from a cursory glance at international rankings, such as those developed by QS and the Times Higher Education group. However, these lack the kind of sociological detail this article is ultimately interested in. The model is not reported here in its entirety, and the classification will only be succinctly described before moving on to the analysis of online learning in each cluster.

Predictably, Oxford and Cambridge belong in a cluster of their own. The second cluster includes the remaining 22 Russell Group Universities, the group of research-intensive institutions, and an additional 17 institutions, defined as 'old universities' because similar to the RG ones in terms of the five stratification dimensions. These universities belonged to the now dissolved 1994 group, a coalition of smaller research-intensive universities that fell apart when, in 2012, several left to join the more prestigious Russell Group. The third and, in particular, the fourth clusters offer an interesting picture of the lower tiers of UK higher education. The third cluster comprises the remaining 13 Old Universities and 54 'new' universities, i.e., former colleges and polytechnics that acquired university status following the introduction of the Further and Higher Education Act in 1992. The fourth cluster, finally, represents the bottom tier as it comprises all the remaining 19 institutions that ranked the lowest in the five stratification measures. In relation to the middle tier universities, Boliver notes that her findings are consistent with previous research as well as more recent work illustrating how several modern universities rank similarly to or even higher than the Russell Group ones, especially in measures of research intensity and student satisfaction. The recent introduction of the Teaching Excellence Framework (TEF) measures in the UK, based on data from student or graduate surveys, seems to support this picture even further (Parr 2017).

The dataset used to produce the clusters is notable for not including institutions offering only post-graduate courses, recently established for-profit institutions and the Open University. The latter omission is particularly glaring in the context of this article, as the Open University is the foremost distance education institution in the UK, the sole owner of the Futurelearn platform and, by far, the most prolific provider of MOOCs in the UK with 64 courses. In many ways, the Open University represents an outlier in the UK higher education context, deserving a separate analysis focused on its specific historical and technological trajectory in the area of distance education.

Having introduced a 'sociologically salient' classification of UK institutions, I will now examine how digital provision maps onto such a characteristically stratified structure. For the purpose of this paper, I will not consider online or 'blended' courses developed in-house using Learning Management Systems (LMS) platforms. I will instead focus on forms of digital provision that involve commercial partnerships between institutions and private providers, on the assumption that these are a manifestation of the processes of unbundling and (quasi) marketization described previously. In particular, I shall focus on two interrelated phenomena: MOOCs developed by universities in collaboration with specific for-profit providers (Coursera, EdX, Futurelearn), and fully online credit-bearing courses delivered by universities in partnership with Online Programme Management (OPM) companies, such as Pearson. For the purpose of this paper, I will assume that there is a distinction between open MOOCs (Table 1) and MOOCs that are explicitly moving towards some form of priced accreditation (Table 2). While this distinction is in reality rather blurred, it is helpful as part of an interpretative strategy that illustrates the progression from (relative) openness to a more traditional business model.

Table 1. Massively Open Online Course (MOOC) provision in the stratified context of UK higher education.

Clusters	Number of MOOCs	MOOC Partner/s
Cluster 1		
University of Oxford	1	EdX
Cluster 2		
University of Leeds (RG)	46	Futurelearn
University of Edinburgh (RG)	36	Futurelearn, Coursera, EdX
University of East Anglia	24	Futurelearn
University of Birmingham (RG)	20	Futurelearn
University of Southampton (RG)	19	Futurelearn
University of Reading	19	Futurelearn
Goldsmiths College	17	Futurelearn
University of Sheffield (RG)	16	Futurelearn
University of Glasgow (RG)	12	Futurelearn
King’s College London (RG)	11	Futurelearn
University of Nottingham (RG)	10	Futurelearn
University of Manchester (RG)	10	Futurelearn
University of Lancaster (RG)	10	Futurelearn
University of Bath	10	Futurelearn
University of Leicester	9	Futurelearn
University of Exeter (RG)	8	Futurelearn
University of Dundee	8	Futurelearn
University College London (RG)	8	Futurelearn
University of Strathclyde	8	Futurelearn
University of Warwick (RG)	7	Futurelearn
University of Liverpool (RG)	7	Futurelearn
SOAS University of London	6	Futurelearn
Newcastle University (RG)	6	Futurelearn
University of Kent	5	Futurelearn
University of Bristol (RG)	5	Futurelearn
University of Aberdeen	5	Futurelearn
Royal Holloway and Bedford New College	5	Futurelearn
University of York (RG)	4	Futurelearn
Loughborough University	4	Futurelearn
Cardiff University (RG)	4	Futurelearn
University of Durham (RG)	2	Futurelearn
Imperial College of Science, Technology and Medicine (RG)	2	Coursera, EdX.
Cluster 3		
Coventry University	8	Futurelearn
Middlesex University	4	Futurelearn
University of Abertay	2	Futurelearn
Bath Spa University	2	EMMA (EU-funded project that aggregates MOOCs from European Universities—not updated since 2016)
University of Northumbria at Newcastle	2	Futurelearn
University of the West of Scotland	1	Futurelearn
Cluster 4		
University of Wolverhampton	1	Canvas Network

Table 2. The ‘second phase’ of digital higher participation in the UK (online degrees and credit bearing MOOCs).

University	Number of Credit Bearing Online Courses (incl. Post-2016 MOOCs)	Private Partner/s
Cluster 2		
University of Liverpool	37 (35 online programs and 2 online doctoral programs)	Futurelearn, Laureate
King’s College London	10	Pearson, Knect365 (Informa)
University of Leeds	5 (3 credit bearing MOOCs, 1 MSc and 1 credit bearing specialization)	Futurelearn Coursera, Pearson
University of Southampton	5	CEG digital
University of Birmingham	3	Wiley
Queen Mary University of London	3	CEG Digital
University of Exeter	2	Keypath
Imperial College of Science, Technology and Medicine	1	Coursera
University of St Andrews	1	Knect365 (Informa)
Cluster 3		
Aston University	3	Keypath
De Montfort University	10	Knect 365 (Informa)
Falmouth University	4	CEG Digital
University of Essex	42	Kaplan Open Learning
Liverpool John Moores University	7	Knect 365 (Informa)
Middlesex University	2 online MBAs and 1 Med	Knect 365 (Informa)
Nottingham Trent University	3	Wiley
Roehampton University	15 (discontinued in March 2018)	Laureate
University of the West of England, Bristol	1	Knect 365 (Informa)
Cluster 4		
Anglia Ruskin University	7	RITE Education Associates
London Metropolitan University	6	Knect365 (Informa)

The information presented in Table 1 can be summarized as follows:

- (a) The vast majority of MOOCs offered in the UK in 2018 (95%) are provided in cluster two, i.e., by high-to-middle tier institutions, with an impressive total of 363 courses offered. The main partner is the UK-based MOOC platform Futurelearn. Thirty-two out of 39 institutions contained in this cluster are involved in MOOC provision at the time of writing. The most active are, unsurprisingly, the Russell Group universities with 243 MOOCs, i.e., 64% of the entire MOOC provision in the UK, the most prolific being Leeds (46) and Edinburgh (36).
- (b) In the third cluster, only five institutions out of 67 are involved in MOOC provision, offering a total of 18 MOOCs, i.e., 4.7% of the total UK MOOC provision.
- (c) In the tiny elite tier, only one MOOC is provided by Oxford University in collaboration with EdX. Similarly, a lone MOOC is offered in cluster 4, the bottom tier, by the University of Wolverhampton, which is however notable for using a K12-oriented platform that explicitly targets secondary teachers and students.

The first notable feature is the consonance between institutional stratification and MOOC provision. If Oxford University and the University of Wolverhampton have anything in common, is that they both dipped their toes in this type of online learning. However, these are quite clearly isolated, peripheral experiences that, for different reasons, failed to catch on in the top and the bottom clusters of UK higher education. Conversely, the high to middle tier is where the vast majority of MOOCs are provided, pointing to a dynamic where both resource capacity and institutional status play a role. With the cost of developing a MOOC estimated to be between £10,000 to £50,000,

with an average of £29,356 (Parr 2015), it is clear that only the largest and most cash-rich institutions can afford investing in this area. Moreover, universities in this cluster still possess a considerable amount of reputational capital compared to lower-ranked ones. Such capital can be used to attract students-as-consumers to flexible, on-demand online provision which, in turn, acts as a marketing tool to advertise the institution's portfolio in related subjects (Davies 2017). For a while, this happened under the banner of openness and the broadening of educational opportunities beyond the usual demographics. Even during this initial enthusiastic period there was a strong interest in monetization and revenues, as MOOCs seemed to be an innovation lacking a sustainable business model. Forms of experimentation with badges and certification soon started and continued despite the 'MOOC backlash' mentioned earlier, with provision and enrolments growing at a steady pace between 2012 and 2017 (Shah 2016) and with providers increasingly moving towards accreditation.

This progression towards accreditation and a profitable business model led to the current phase. The analysis of publicly available information undertaken for this article suggests that the growing interest in certification is driving MOOC platforms and their partner universities to compete directly with OPM companies (Table 2). This is indeed a recent phenomenon that has been gathering momentum in the US, where a number of high-profile MOOC-based degrees emerged over the past few years, such as the Georgia Tech's Online Computer Science Master's Degree¹, or the MITx MicroMasters². Similarly, a number of Australian and UK institutions, in partnership with the platform Futurelearn, started in 2016 to experiment with various forms of accreditation (Bothwell),³ moving towards a more profitable pricing structure for MOOC-based provision.

What seems to characterize the current phase is a high degree of market dynamism and no small amount of confusion. Agreements between universities and private partners are often opaque or only partially communicated, possibly to avoid drawing attention to the blurring of responsibilities in relation to certification and quality control, and to protect institutional reputations. Contracts are sometimes discontinued (e.g., Roehampton University and Laureate ending their partnership in March 2018) while new ones are made and unmade behind the scenes. King's College, for example, offers at the time of writing two postgraduate degrees in partnership with Pearson Online Education, but no information about Pearson's actual responsibilities in the delivery of the courses could be found on the course information webpages. Similarly, the University of Leeds and Pearson announced a partnership in March 2017 to launch a fully online MBA, which then disappeared from the University's website without trace.

Together, Tables 1 and 2 tell an interesting story about the current landscape of digital learning. On the one hand, MOOC providers, OPM companies and universities are becoming entangled in a number of overlapping negotiations, deals and business models; on the other hand, a differentiation pattern is still visible, mainly concerned with reputational value, perceived quality of provision and the institutions' position in a stratified structure. In the high-to-middle tier, MOOC-providing institutions and platform holders like Coursera or Futurelearn are poised to market their accreditation-based offerings as 'premium' products that target middle class, relatively affluent students-as-consumers with an appetite for flexible online learning. In this sense, the MOOC experimentation of the past few years provided a replicable template supported by data-based market analysis. In other words, the homogenous demographic composition of MOOC participants did not point to a failure of their promise to democratize education, but to new markets ready to be tapped into. The post-2016 accreditation-based MOOCs are doing exactly that. At the same time, OPM leaders such as Pearson also operate in this space by clearly targeting highly-ranked and prestigious institutions, and competing directly with MOOC providers like Futurelearn and Coursera. The preference of large, global OPM

¹ <https://www.class-central.com/report/moocs-for-credit/#omscs>.

² <https://micromasters.mit.edu/>.

³ <https://www.futurelearn.com/programs>.

companies for higher-ranking institutions is also evidenced by emerging findings from research carried out in the South African context (Swinnerton et al. 2018).

Beyond the high-to-middle tier, considerably 'messier' instances of marketization can be observed. Smaller OPM providers are active in the third and fourth clusters alongside larger companies, reflecting an inconsistent pattern of business and enrolment strategies. For example, the University of Essex offers a large number of online degrees in collaboration with Kaplan Online Learning, explicitly targeting TNE students through the 'Kaplan Pathway' system, which gives international students a 'chance to gain access to excellent universities through pathway courses'. These courses provide guaranteed access to campus-based degrees at Essex after a short preparation phase lasting generally two terms. For those who lack the means, or the will, to undertake the pathway route, online and overseas-based provision are framed as 'other routes to an Essex Degree', as part of a clear strategy of product differentiation, articulated along lines defined by market choice. In the bottom tier, another OPM company, RITE Education Associates, describes itself as a 'boutique education consultancy in Malaysia and South-East Asia', offering courses with degrees awarded by Anglia Ruskin University, but delivered in partnership with a private business school called the London School of Marketing. This company is, in turn, owned by a private organization called LS Education that employs software specialists, designers, content authors and business developers. These partnerships between universities and private companies increasingly rely on networks of 'educational agents' that negotiate access to migration routes for those who can afford the costly visa applications, or to a combination of physical and online ('blended') local alternatives for those who cannot. The London School of Marketing BA's brochure states the following:

We know that international students are finding it increasingly difficult to obtain visa to travel to the UK to study. We also know that UK qualifications are recognized and valued by employers around the world. That is why we have developed a network of Local Access Points (LAPs) which enable us to take our qualifications to you instead of expecting you to travel to us. With IT-driven education as one of our core competencies, we can guarantee the consistency of our programs by relying on a comprehensive quality control process.

To put it briefly, a trend of low-grade unbundled provision is discernible in the lower clusters of UK higher education. As part of this trend, institutions may be involved in 'content development' but act primarily as awarding bodies, while online courses are assembled and then delivered by private providers, sometimes with different components of the same course confusingly sourced from multiple institutions at the same time. Take, as an example, the Postgraduate Diploma in Diplomacy and Security offered by the PLC Informa through its digital content platform Knect365, delivered by London Metropolitan University, with 'online tutoring' provided by Liverpool John Moores University, which also awards the actual degree at the end⁴. This approach does not seem to offer solid guarantees in terms of quality, and, in fact, it could be criticized for being rather exploitative. Indeed, the unbundling of provision observable in the bottom tiers of UK higher education highlights cases in which the University brand is clearly not valuable enough to warrant robust quality assurance, but it is still high and presumably 'British' enough to be sold on the digital education marketplace.

4. Discussion and Conclusions

This article tries to advance critical understandings of the marketization of higher education. The argument was developed by collecting freely available information about online courses and the underlying agreements between institutions and private partners. This information was then organized according to a stratified classification of UK universities. In this final section, I will discuss the twofold contribution of this article to a prospective research agenda.

⁴ <http://www.courses.knect365-learning.com/event/diplomacy-and-security-studies-distance-learning-course/AboutLondonMet>.

Firstly, digital learning can be treated as a focal point for the study of marketization in higher education. In this space, forms of status-based differentiation can be observed as they unfold dynamically. Indeed, analyzing digital provision through a stratification lens proved to be rather effective, as it highlighted the status-related strategies and the market dynamism currently observable among high-to-mid-tier institutions. Among the elite universities, only Oxford timidly engaged with this form of provision, and this is consistent with a specific historical trajectory that sets the very top institutions apart from all others. In the rarefied top-end of global HE, world-leading institutions like Oxford and Cambridge use their vast amounts of reputational capital to, define their own rules and shape the very conditions in which they operate. Just below the world-leading elite, there is sprawling region where market dynamism actually seems to lie. Here, reputation and branding are at the heart of the 'market making' performances described by [Komljenovic and Robertson \(2016\)](#): Alliances, mediations, partnerships and 'market encounters' (see also [Çalışkan and Callon 2010](#)). For these institutions, brand and reputation are locked in a tension between commercialization and traditionalism, and the upward pull of the top end is still strong. The current phase of expansion through digitization is largely unfolding in this region, through a mushrooming of alternative forms of accreditation and online degrees. Finally, a bottom region of low-ranking institutions are drifting towards an unregulated marketplace of low-grade unbundled offerings that target 'missing middle' groups in the global south and Asia, but also the increasingly vulnerable middle-to-low income groups in the global north.

Secondly, the dynamics of status-based differentiation in the online education marketplace open up areas for further, sociologically-oriented research. In this regard, more work is needed on how different groups from a range of socio-economic backgrounds successfully or unsuccessfully navigate an increasingly fragmented and 'unbundled' educational terrain, and how differentiation is assuming new digital forms. In other words, more attention should be paid to the increasingly global, often digital, nature of many educational trajectories. As already noted in this article, research on the MOOC demographics suggests that there is an overlap between socially-advantaged groups and those who are attracted to digitization, as it allows unprecedented levels of modularization whilst being attractive to individual students/consumers who can pick and mix their courses, choosing how to participate according to their personal needs and preferences. More research is needed on how these privileged groups negotiate digital educational opportunities. Equally, we need more in-depth and critical analyses of less advantaged groups, i.e., people who still engage with the marketplace of online education seeking status advancement and better life chances, but may lack the social and economic capital to engage effectively with the positional game of education. Sociological research on status and stratification in cultural consumption can offer useful conceptual resources to interpret what is currently unfolding in higher education ([Chan and Goldthorpe 2007](#)). This research has helped move mainstream sociology beyond rigid class-based distinctions, such as those theorized by Pierre Bourdieu ([Bourdieu 1984](#)). Bourdieu suggested that cultural consumption is largely determined by class position and underpinned by economic relations, expressed through a more or less stable set of 'structurally determined' behavioral dispositions (the Habitus). This view is in contrast with the equally influential Weberian view whereby class is analytically distinct from status, with the latter less dependent on economic factors and based, above all else, on more agentic forms of 'lifestyle' informed by social structures of superiority and inferiority ([Weber 1968](#)). The point of these debates is not to speculate on the peculiarities of cultural taste, but to better understand dynamics of social stratification. In this sense, the Weberian hypothesis has had a fair degree of empirical validation, suggesting that whilst opportunities to engage in cultural life are still unevenly distributed, status plays a more important role than social class in processes of stratification and, therefore, in reproducing enduring forms of inequality ([Chan 2010](#)). Like cultural consumption, also 'educational consumption', exemplified mostly (but not only) by choices and preferences in the online learning marketplace, could be examined in terms of status-based differentiation. This examination should include an interest in how technology is being used in an 'agentic' fashion to assemble educational pathways

and opportunities, while at the same time serving the structuration agenda, as institutions unbundle, differentiate and repackage their increasingly commodified stock of educational products.

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