Olaf Zawacki-Richter
Insung Jung

Editors

Handbook of Open, Distance and Digital Education

Springer

Handbook of Open, Distance and Digital Education

Olaf Zawacki-Richter • Insung Jung
Editors

Handbook of Open, Distance and Digital Education

With 82 Figures and 48 Tables

Springer

Editors
Olaf Zawacki-Richter (iD)
Center of Open Education Research
Carl von Ossietzky University
of Oldenburg
Oldenburg, Niedersachsen, Germany

Insung Jung (iD)
Education Research Institute
Seoul National University
Seoul, Republic of Korea

Contents

Theories of Motivation and Empowerment in Open, Distance, and Digital Education

Empowering Attributes, Contexts, and Experiences

11

Clarence Ng

Contents

Abstract

Motivation instigates and guides learning in open, distance, and digital education (ODDE). It is indispensable to distance learners' engagement, persistence, and achievement. A lack of motivation is associated with perennial issues such as early dropout and poor performance in ODDE. This chapter provides an introduction to key theoretical perspectives on motivation, including sociocognitive theories, sociocultural theories, and the concept of perezhivanie. Each perspective provides a unique way for understanding and researching motivation in open and distance learning (ODL). Motivation is discussed as personal attributes internal to the distance learner from a sociocognitive perspective. Drawing attention to social processes and contextual influences, sociocultural theories situate motivation in relevant contexts and highlight motivation as a social, interactive, mediated, and evolving construct. The concept of perezhivanie gives prominence to distance learners' learning experiences and subjective meanings they derived

C. Ng (✉)
Institute for Learning Sciences and Teacher Education, Australian Catholic University, Brisbane, QLD, Australia
e-mail: clarence.ng@acu.edu.au

from personally significant experiences in ODL. This perspective pinpoints motivation that is experiential, reflective, and affect-laden. To advance the goal of empowering distance learners to engage and persist in ODL, these theoretical perspectives are important as they underscore empowerment derived from enabling personal attributes (sociocognitive theories), motivating contexts (sociocultural theories), and personally significant experiences (perezhivanie).

Introduction

Motivation refers to states and processes, internal to the learner or originating from the social realm, that energize, direct, and sustain actions toward a valued goal (Nolen, Horn & Ward, 2015; Pintrich & Schunk, 2002). Motivation is important for open, distance, and digital education (ODDE) because it instigates engagement and promotes learning and achievement (Cho & Heron, 2015; Semenova, 2020; Vayre & Vonthron, 2017). It draws attention to open and distance learning (ODL) as goal-directed activities and offers answers to questions regarding why and how learners engage in ODL. Motivation is especially important for ODDE because distance learners can easily feel isolated, lonely, and helpless during the protracted journey of learning, despite improved interaction enabled by advanced computing technologies. It is hard to imagine that an unmotivated learner is able to persist and remain committed during the extended process of ODL. Expectedly, the critical role of motivation in ODDE has long been recognized as "a necessary pre-condition for distance education" (Cropley & Kahl, 1983, p. 31).

The purpose of this chapter is to provide an introduction to the key theoretical perspectives on motivation that have informed or have the potential to inform motivation research in ODDE. It is beyond the scope of this chapter to offer a comprehensive review on motivation research and associated theories in ODDE. According to Ng (2019), most of the published studies on motivation in ODDE emerged after 2000. These studies were predominantly conducted using socio-cognitive theories of motivation. Given the importance of this bulk of research, this chapter starts with a discussion of sociocognitive theories of motivation that conceptualize motivation as personal attributes internal to the distance learner. This is followed by a discussion of sociocultural theories that give prominence to social processes and contextual influences affecting motivation in ODDE. Extending this sociocultural discussion, this chapter goes on to argue that research attention is required to examine distance learners' learning experiences in ODDE as an important way to understand their motivation. To this end, the Vygotskian concept of perezhivanie (Vygotsky, 1994) is adopted, which is understood generally as emotional lived experiences (Blunden, 2016). The concept of perezhivanie has the

potential to improve our understanding of distance learners' experiential motivation, as it anchors learning experiences in emotionally charged moments or episodes and offers an understanding of distance learners' motivation as dynamic interplays between personal attributes and social influences derived from the ODL context and other relevant social realms (cf., Ng & Renshaw, 2019).

Motivated Learners: Empowering Attributes

Sociocognitive theories define motivation as mental states and processes, such as "attributions, perceptions of competence, values, affects, goals, and social comparisons" (Pintrich & Schunk, 2002, p. 20), which is different from earlier conceptualizations that consider motivation as needs (McClelland, 1963), drives (Hull, 1943), or reinforcement (Skinner, 1971). Motivation, from a sociocognitive perspective, is therefore located in the mind of an individual. Aligning with this individualistic perspective, context is considered as a background variable for understanding personal motivation, and contextual influences are interpreted based on perceptions. Sociocognitive theories differ from each other in relation to targeted mental processes, hence leading to the development of a list of motivational models highlighting facilitating beliefs, goals, values, and strategies that enable learning motivation.

Sociocognitive theories on motivation empower distance learners in several ways. First, sociocognitive theories enable a multifaceted view of motivation, maintaining that learners can be motivated in multiple ways (Ng, 2019). An important research task is to locate and examine different cognitive enablers that facilitate distance learners' motivation and develop effective practices to promote them (Pintrich & Schunk, 2002). Second, sociocognitive theories consider learners as motivated agents capable of managing resources and regulating their actions to produce intended outcomes aligned with their motivation (Bandura, 1997). This position fits in with the conception of self-directed learners widely held among distance educators (Garrison, 2003). Third, while motivation is located in the mind, motivation is not static or fixed and should be considered changeable (Lee, 2015). In other words, distance learners' motivation may vary across context and over time. This theoretical position underscores the importance of developing and verifying ODL designs and practices to support distance learners' malleable motivation.

In what follows, four cognitive enablers, i.e., self-efficacy, achievement goals, intrinsic motivation, and self-regulation, that have attracted much research attention among distance education researchers are described (Ng, 2019). Conceptually, these cognitive enablers highlight motivation as beliefs (self-efficacy), reasons (achievement goals), values (intrinsic motivation), and strategy use (self-regulation).

Self-Efficacy

Self-efficacy is an individual's task-specific beliefs concerning "one's capabilities to organize and execute courses of action required to produce given attainments"

(Bandura, 1997, p. 3). Self-efficacy determines effort expenditure, goal setting, and persistence in facing challenges (Bandura, 1997; Vayre & Vonthron, 2017). It is considered a powerful predictor of learning and achievement (Pajares, 1996). Given its significance to learning, other motivational models, such as those included in the discussion below, have incorporated perceived competence in their formulations. In the context of ODDE, self-efficacy is critical because feeling efficacious is important for dealing with challenging tasks, regulating learning, and maintaining persistence. In relation to online learning, distance learners need to feel efficacious at using the Internet and online technologies and interacting with instructors and classmates (Tsai, Cho, Marra, & Shen, 2020) in order to gain benefits from using advanced technological tools for learning and interacting with others. Otherwise, distance learners may feel anxious which may jeopardize their ongoing participation in online settings. Most importantly, self-efficacy is a strong predictor of distance learners' performance (Puzziferro, 2008). It is also a predictor of a variety of adaptive responses and actions including persistence, engagement, satisfaction, and course completion (Vayre & Vonthron, 2017).

Promoting self-efficacy requires the provision of abundant opportunities for distance learners to experience success. How such opportunities can be designed and offered is undoubtedly a priority research topic in ODDE. To do this well, the issue of conceptual clarity needs research attention, as there are studies (e.g., Tladi, 2017) that have deviated from the task-specific conceptualization of self-efficacy. Further effort is required to examine self-efficacy at a finer grain size in relation to specific tasks central to ODL. For example, completing an assignment in an ODDE course involves a list of specific tasks related to comprehending distance learning materials, interacting with others, and regulating the writing process whereby self-efficacy for each task can be assessed. In the context of online learning, Tsai et al. (2020) provided a research example assessing different dimensions of online self-efficacy, including completing online courses, using online technologies, interacting with the instructor, and interacting with classmates socially and for academic purposes. Furthermore, additional effort is required to examine distance learners' changing beliefs in self-efficacy over time and the factors that have triggered such changes (Lee, 2015).

Achievement Goals

Achievement goals refer to students' perceived goals or reasons for learning and achievement (Dweck, 1986). In the past three decades, achievement goal research has focused predominantly on two categories of goals, i.e., mastery goals and performance goals. Mastery goals orient students to learn for the sake of improvement and comprehension; performance goals, however, orient students to focus on achievement and ability comparison. Achievement goal researchers (e.g., Harackiewicz, Barron, & Elliot, 1998) have elaborated approaching and avoidance orientations of these two categories of goals, resulting in a 2 × 2 conceptualization comprising mastery-approach, mastery-avoidance, performance-approach, and

performance-avoidance goals. Remedios and Richardson (2013) verified this quadruple framework based on a study of British distance learners who rated mastery-approach goals as the most important goal. Convergent evidence supporting the importance of mastery-approach goals for distance learning has been reported in other studies (e.g., Cho & Shen, 2013; Ng, 2017, 2018), confirming that a mastery focus is highly motivating and closely related to self-efficacy beliefs and the use of self-regulatory and learning strategies. Nevertheless, the extent to which performance goals can be beneficial to learning and achievement is a major point of contention in achievement goal research. Accumulated evidence has shown that performance-approach goals bring motivational benefits to learning and achievement, leading to a call for the endorsement of performance-approach goals alongside mastery-approach goals (Harackiewicz et al., 1998). Therein, some studies in ODDE (Ng, 2017, 2018; Remedios & Richardson, 2013) have provided empirical support to the benefits of simultaneous adoption of both mastery- and performance-approach goals in ODL.

Thus far, few researchers have examined how achievement goals operate in online environments such as MOOCs and blended learning courses (see Cho & Shen, 2013). In addition, it is likely that distance learners may learn for reasons other than mastery or performance considerations. For example, personal development and career considerations are important reasons for learning in ODDE (Ng, 2018). It is important to examine these additional reasons and their motivational effects on beliefs, strategy use, and performance following the achievement goal conceptualization. Furthermore, future research should adopt qualitative methods, such as interview, to examine distance learners' reasons or goals for learning, as survey designs, the dominant method in the extant literature, constrain distance learners' responses to predetermined categories in a questionnaire. Given the motivating effects of mastery-approach goals, it is important to explore how a mastery focus can be instigated in ODL designs.

Intrinsic Motivation

Intrinsic motivation refers to engaging in an activity for its inherent values such as advancing one's interest in a topic, while extrinsic motivation refers to external rewards that are separable from the activity itself. In other words, intrinsically motivated learners engage in learning for its own "inherent satisfactions rather than for some separable consequence" (Ryan & Deci, 2000, p.56). In contrast, extrinsically motivated learners are driven by external stimuli, such as high scores and meeting a deadline. Past studies have compared and contrasted differential patterns of learning and engagement between intrinsically and extrinsically motivated learners, affirming the importance of intrinsic motivation to learning (Cerasoli, Nicklin, & Ford, 2014). In the context of ODDE, intrinsic motivation refers to distance learners' interest in enjoyment and valuing of learning tasks and activities offered through ODDE courses. Using a large student sample drawn from different degree programs, Fırat, Kılınç, and Yüzer (2018) found that distance learners' levels

of intrinsic motivation were generally high. In terms of the effects of intrinsic motivation, Tang, Xing, and Pei (2018) found that intrinsically motivated learners were more engaged in learning compared to those whose intrinsic motivation was weak. Also, Semenova (2020) found that intrinsically motivated learners were more likely to complete MOOCs and earn a certificate. She attributed these affirmative results to intrinsically motivated learners' positive self-perceptions and their abilities to use strategies successfully to deal with learning challenges. In short, these research examples have provided convergent evidence, verifying the significance of intrinsic motivation to ODL.

Intrinsic motivation may vary with age because, as a learner ages, "the freedom to be intrinsically motivated becomes increasingly curtailed by social demands and roles that require individuals to assume responsibility for nonintrinsically interesting tasks" (Ryan & Deci, 2000, p. 60). This hypothesis of declining intrinsic motivation with age has not yet been tested among distance learners. In addition, the relationship between intrinsic and extrinsic motivation is a contentious topic in the literature. It has been argued that intrinsic motivation can be undermined by external rewards, especially those that are perceived as controlling (Deci, Koestner, & Ryan, 1999). But limited research in ODDE has explored this complex issue. There is, however, some evidence supporting the motivational benefits of extrinsic motivation to ODL. For example, Semenova (2020) showed that an intention to earn a certificate was associated with completion in MOOCs. Further research is required to examine the nature of extrinsic motivation in ODL, taking into account the mediational effect of distance learners' perceptions of external stimuli. In relation to the promotion of intrinsic motivation, recent studies have shown that supportive measures such as responsive tutor feedback (Simons, Leverett, & Beaumont, 2020) and offering of options in assignment (Hanewicz, Platt, & Arendt, 2017) can be effective, suggesting that satisfying distance learners' needs for autonomy and competence may hold the key to promoting intrinsic motivation (Ryan & Deci, 2000).

Self-Regulation

Self-regulation, according to Zimmerman (1989), offers a management perspective on learning that integrates motivation, emotion, and strategy use for attaining desired outcomes. In the literature, self-regulation is not normally taken as a motivation theory on its own. However, if motivation is about *why* and *how* students are instigated during the learning process, self-regulation offers an important account to the "how" question by examining students' use of cognitive and metacognitive strategies in managing the learning process. Importantly, self-regulated learners are motivated, confident, and strategic. They plan and set goals for their studies, monitor progress, and reflect on learning. They often feel positive about learning and know how to manage negative emotions such as boredom (Cho & Heron, 2015). Expectedly, self-regulated learners usually perform better than their counterparts who are weak in managing the learning process (Bernard, Brauer, Abrami, & Surkes, 2004).

Self-regulation is critical for distance learners, as they are expected to exert a high level of control during the process of learning. Conceptually, self-regulation is a

natural fit aligning with the widely accepted notion of self-directed or self-independent learning in ODDE (Garrison, 2003). Self-regulated strategies including cognitive, metacognitive, and resource management strategies are important self-regulated abilities expected of distance learners who are required to self-direct their learning. Distance learners who effectively deploy these strategies to regulate their learning are engaged during the ODL process; they tend to have better achievement and are more likely to persist (Stephen, Rockinson-Szapkiw, & Dubay, 2020). Significantly, the review of Lee and Choi (2011) found that a lack of self-regulation was a major reason for distance learners who quit online courses, suggesting that promoting self-regulation is an important avenue to tackle the problem of dropout in MOOCs and other ODDE courses (Alario-Hoyos, Estévez-Ayres, Pérez-Sanagustín, Kloos, & Fernández-Panadero, 2017).

Given the benefits of self-regulation, course designs and the provision of support in ODDE need to develop effective practices to promote self-regulation. Andrade and Bunker (2009) depicted a design model for promoting autonomy and self-regulation in distance learning language courses. However, few have built on or adapted their model to promote distance learners' self-regulation. In relation to online learning, Cho and Cho (2017) verified a self-regulation scale to measure interaction online. This represents a new area of research on self-regulation in ODDE, and more research efforts should be expended on this area, given that online interaction has already become a critical component in ODDE. The work of Park and Yun (2018) draws attention to an under-researched area of self-regulation, i.e., regulating motivation, which is important to distance learners because their motivation may fluctuate during the lengthy period of learning. Finally, interview or qualitative studies on self-regulation in ODDE are rarely found, despite the fact that Zimmerman's pioneer work on self-regulation was built on structured interviews (Zimmerman & Martinez-Pons, 1986).

In summary, sociocognitive theories of motivation offer parsimonious models centering around cognitive enablers for understanding motivation and engagement in ODDE. Empirical studies in ODDE, as discussed above, have examined and confirmed the motivational effects on learning and achievement of four cognitive enablers including self-efficacy, achievement goals, intrinsic motivation, and self-regulation. Thus far, motivation research in ODDE has seldom been conducted using motivational models other than those discussed in this section. Future research should broaden theoretical understanding of distance learners' motivated learning and explore additional cognitive enablers using other influential sociocognitive models, such as expectancy-value model and flow theory. In addition, more research effort is certainly required to examine how verified motivational enablers can be used to inform instructional designs to promote distance learners' motivation and engagement.

Motivating Communities: Empowering Contexts

In this section, sociocultural theories of learning, inspired by the work of Vygotsky, are used to understand motivation and engagement in ODL. Sociocultural theories situate learners, learning, and motivation within cultural and historical contexts. From a sociocultural perspective, the learner and learning context are reciprocally

related (Nolen et al., 2015); learners are not subjects independent of the context. Learning, motivation, and engagement are embedded in and constituted by a matrix of relationships and interactive processes that are facilitated by advanced peers and cultural tools in a learning context (Renshaw, 1998). This is different from socio-cognitive models that consider learning and motivation as internal processes or individual phenomena. Based on conventional Vygotskian concepts such as zone of proximal development, assisted learning, and cultural tools, Sivan (1986) was the first to argue that a sociocultural perspective enables an examination of contextual and cultural influences on motivation while addressing intra-psychological function-ing and inter-psychological influences. Hence, Sivan's theoretical analysis avoids social reductionistic treatment of motivation and broadens our understanding of the social origin of motivation and how it operates beyond an individualistic orientation.

Several major developments in ODDE have made sociocultural theories highly relevant to researching motivation in ODL. First, advanced Internet and computing technologies have enabled asynchronous and synchronous interaction, highlighting ODL as an interactive learning process (Cho & Cho, 2017). This technological turn situates ODL in a technology-enabled social context and challenges the character-ization of distance learners as lone learners working through guided materials in a solitary manner. Second, increased learner diversity has become a feature of ODDE. This is especially the case in MOOCs which enroll distance learners from different countries and cultures who hold different purposes and motivations for learning (Alario-Hoyos et al., 2017). Addressing complex issues of motivation arising from learner diversity requires a theoretical framework that is effective in capturing social and cultural influences on motivation and learning. Third, high dropout rates in MOOCs and other ODDE courses accentuate the importance of motivation (Semenova, 2020). A key question is whether ODL environments are engaging to the extent that distance learners' initial motivation is supported and sustained until completion (Ng, 2019). Considering these developments, sociocultural theories of learning, inspired by the work of Vygotsky, are theoretically important for under-standing distance learners' motivation and engagement in evolving contexts beyond what an individualistic framework can offer. Context here is not a static entity; neither can it be reduced to distance learners' perceptions, as conceptualized and measured in studies conducted using a sociocognitive perspective.

Different sociocultural theories of learning and development have been proposed in the past several decades, including, but not limited to, communities of practice (Wenger, 1998), situated learning (Lave & Wenger, 1991), guided participation (Rogoff, 1990), activity theory (Engeström, 1987), and distributed cognition (Salo-mon, 1997). It is impossible to provide a detailed discussion of each of these theoretical frameworks. Below, how motivation can be understood from these sociocultural models is succinctly explained.

Common to these sociocultural models is a Vygotskian principle of social origin of learning and motivation. Differing from sociocognitive models of motivation discussed in the previous section, these sociocultural models maintain that motiva-tion and engagement originate not from internal processes or beliefs but from external realms, as individuals participate in cultural activities, acquire important

cultural tools, collaborate with or are assisted by others, develop a sense of belonging, and build new identities in different communities. Based on Wenger's communities of practice (1998), motivation can be understood as part of a joint enterprise in a community where newcomers acquire shared knowledge and practices through interacting with core members and participating in valued activities. From the perspective of activity theory (Engeström, 1987), motivation is situated in a specific activity system wherein a team of subjects or individuals' tool-mediated actions and interactions toward a shared object and outcome are constrained by a distinct set of norms, rules, and roles shared among members of relevant communities. Rogoff's work on guided participation (1990) highlights motivation derived from collaboration with and guidance offered by carers or advanced peers who help apprentices acquire culturally valued knowledge and skills and understand not only how to use them but also why they are important in complex social settings. Offering a similar focus on collaboration, the work of Salomon (1997) on distributed cognition highlights that cognition is not confined to our head but also located in the social and material worlds wherein collaboration is an important way for improving cognitive performance. Ng (2019) built on this work and proposed the notion of distributed motivation, pointing out that motivation is not confined to individuals' cognitive attributes but also present in different aspects of an ODL activity system. To sum up, based on these sociocultural theories, motivation is social, contextual/situated, mediated, interactive, and evolving. Further discussions on a sociocultural perspective on motivation can be found in recent motivational analyses that have built purposefully on these sociocultural theories (e.g., Nolen et al., 2015).

Researching motivation from a sociocultural perspective is to examine how motivation is socially constructed, emerges through social interaction, and manifests in participation and engagement in a social setting. In short, motivation is context-embedded and cannot be fully understood if it is removed from the context. This also means that the research unit is no longer confined to individuals or their perceptions or cognitions but should involve the person and the context, i.e., a community together with its members. To illustrate, Nolen (2007) provided longitudinal data to show how grade 4 students' motivation to read and write was influenced by social meanings of literacy activities that were co-constructed among collaborating students and teachers in classroom communities. These students' motivation to read and write could not be accurately understood if social influences derived from the classroom communities were not considered.

When it comes to ODL, a sociocultural perspective on motivation draws attention away from distance learners or whether they are motivated. Analytic primacy should focus predominantly on the provision of motivational support through careful instructional designs and delivery of engaging materials and collaborative opportunities. This is empowering, as it shifts the research focus from motivated learners to motivating learning environments (Ng, 2019) and avoids a deficit perspective that places the blame mainly on distance learners when they fall behind or quit prematurely. Though sociocultural studies on motivation in ODL, compared to sociocognitive investigations, remain scarce (Ng, 2019), impactful studies were reported elaborating how community-of-practice designs promote participation (e.g., Cowan & Menchaca,

2014) and how collaboration and peer supports mediate learning and engagement (e.g., Engle, Mankoff, & Carbrey, 2015). As a case in point, Nye (2015) described the development of an online academic community for an arts degree program where lecturers, students, and alumni participated as members. Specific activities and sharings, such as lecturers' and alumni's sharings of their learning experiences, were designed to promote interaction and facilitate students' aspiration for postgraduate research studies. Off-campus students acknowledged that participating in this online portal promoted a sense of belongingness and connection.

However, current sociocultural studies on motivation in ODDE, as illustrated in the examples cited above, share a common weakness in that motivation is not explicitly addressed, monitored, or measured. In this case, arguments concerning how sociocultural designs in ODL promote motivation and improve engagement remain inconclusive. In addition, it should be noted that many ODL studies (e.g., Fung, 2004) that have investigated topics such as interaction and collaboration are not always designed using or aligning with sociocultural theories or models. Therefore, more concerted efforts are required to examine motivation from a sociocultural perspective given the issues of dropout, increased diversity, and the critical importance of deploying technologies as a cultural tool for learning. Following Vygotsky, a sociocultural perspective on motivation and engagement in ODDE should focus on the social nature of motivation and to understand how motivation is initiated, developed, and changed, as distance learners participate and co-participate in different ODL contexts that are socially, culturally, and technologically constructed (cf. Nolen et al., 2015; Walker, 2010). This requires an orchestration of a suite of research methodologies including interview and observation to capture contextual particularities and influences. Research attention should also be given to developing and examining effective sociocultural designs utilizing advanced technologies as a cultural tool to promote motivation, participation, and engagement in ODDE.

Experiencing Motivation-as-Lived: Empowering Experiences

In the previous two sections, motivation is discussed as personal attributes from a sociocognitive perspective and as socially originated and contextually embedded constructs based on sociocultural theories. Extending the sociocultural discussion of motivation, an important theoretical issue is how the social becomes individual, and vice versa. Addressing this issue, Walker (2010) discussed the relationship between the social and individual. Based on Valsiner's notion of inclusive separation (1997), Walker argues that the social and individual are dynamically interdependent. This theoretical argument is important for understanding and researching motivation, as it points to the fact that motivation is not socially determined and should be understood as dialectical relations between the social and individual, which is also an important issue that Vygotsky discussed toward the end of his life using the concept of perezhivanie (i.e., emotional lived experience; Vygotsky, 1994). In this section, the Vygotskian concept of perezhivanie is invoked to explore motivation as an ongoing experiential process whereby motivation is derived from distance learners' lived

experiences of ODL and how they make sense of them. This situates motivation in dialectical relations between the person and context (cf. Ng, 2021).

In "The Problem of Environment," Vygotsky (1994) recounted three children's distinct perezhivaniya (plural) in an abusive home environment where each child felt uniquely about this shared problem/context and responded differently due to differences in social roles and cognitive understanding. Vygotsky (1994) used this case to illustrate the generative function of the concept of perezhivanie for understanding child development, stating:

> the emotional experience (perezhivanie) arising from any situation or from any aspect of his [sic] environment determines what kind of influence this situation or this environment will have on the child. Therefore, it is not any of the factors in themselves (if taken without reference to the child) which determines how they will influence the future course of his development, but the same factors refracted through the prism of the child's emotional experience (perezhivanie). (p. 339)

The refractive process, mentioned in the quote above, highlights the importance of locating significant factors and conditions derived from both internal and external sources that one uses to make sense of an event or experience. Hence, perezhivanie represents how an individual "becomes aware of, interprets, [and] emotionally relates to a certain event" (Vygotsky, 1994, p. 341).

Perezhivanie is understood generally as an emotional lived experience in western scholarship (Blunden, 2016). It was Vygotsky's attempt to define a unit of analysis that avoids divisions between person and environment, between thinking and feeling, and between consciousness and action (González Rey, 2011; Roth, 2017; Veresov & Fleer, 2016). Perezhivanie can be understood as a phenomenon and as a theoretical concept (Veresov & Fleer, 2016). As a phenomenon, perezhivaniya are anchored to actual emotionally charged episodes or dramatic events that are lived through and relived (Blunden, 2016). As a concept, perezhivanie involves dialectical relationships between the person and context (Veresov & Fleer, 2016), complex connections between emotion and cognition (Roth, 2017), and a refractive process whereby individuals construct a subjective configuration uniting the internal and external realms (González Rey, 2011). Aligned with a perezhivanie perspective, motivation is derived from distance learners' learning experiences and their refraction of these experiences across time and space. Motivation and engagement can therefore be recast as in-the-moment experience and beyond-the-moment reflection, hence experiential and reflective in nature (see Ng, 2021; Ng & Renshaw, 2019 for research examples elaborating these ideas). This conceptualization offers a way of theorizing motivation and motivated engagement as an ongoing process that is simultaneously sense-making, self-making, and laden with affect (Renshaw & Tooth, 2016). It addresses the conceptual limitation of separating the personal and social realms into independent entities. It also highlights the historical process of motivation and engagement, as learners bring their life experiences to every socially and culturally constructed context they participate as a member (Ng & Renshaw, 2019). Furthermore, perezhivanie acknowledges the critical role of emotions during the motivational process (Roth, 2017).

Research on perezhivanie, though limited, has begun to attract interest among educational researchers working in different areas. In the field of early childhood education, Chen (2022) showed how parents' own perezhivaniya play a significant role in supporting children's emotional regulation. In the field of teacher education, Golombek and Doran (2014) highlighted the pervasiveness of emotional content and its link with novice teachers' perezhivaniya of teaching. In relation to learning and engagement, Ng and Renshaw (2019) used this concept to track the evolvement of and changes in reader identities of an Indigenous Australian student, Lisa, over 3 years. In this study, motivation to read was shaped constantly by Lisa's experiences of reading in school and at home, her feelings and interpretations of these experiences, and the identities that she created or was assigned to her, as she read for different purposes to meet personal needs and others' expectations in different settings. In another study (Ng, 2021), two middle school students' learning intentions and subject choice plans in mathematics were tracked for 3 years. The findings showed that subject choice is not just a decision that is made at a specific point of time but also involves an extended socially constructed process that is interspersed with contradictions, uncertainties, and struggles. Complex connections between emotions and cognitions were involved, as these students engaged in mathematics activities and considered their future in this subject area.

These empirical examples, alongside the theoretical works of Blunden (2016), González Rey (2011), Roth (2017), and Veresov and Fleer (2016), have significant implications for researching motivation in ODDE. First, distance learners' motivation can be understood as experiential in nature. Motivation is derived from distance learners' in-the-moment experiences as they engage in different components of ODL, alone or in collaboration with others in online or offline settings. Motivation can be derived from distance learners' own psychological realm, as well as technological, material, and other external realms in each learning occasion or event. From a perezhivanie perspective, the key is to consider these different elements as a united whole for understanding distance learners' personal learning experiences and their experiential motivation in a specific situation. Importantly, different interpretations and meanings can be imbued from a shared experience by different learners, which may be associated with differential motivation responses. Also, a distance learner may feel differently about a past experience or a similar event and hence be motivated differently, as relevant circumstances and considerations may change over time. Second, distance learners' motivation involves complex connections between emotion, cognition, and action, which, at times, can be inconsistent. For example, a distance learner may persist even though limited motivation can be derived from distance learning materials that are perceived as disengaging. Understanding this learner's perezhivanie provides an important insight on how conflicting emotions and cognitions are interpreted and resolved to inform his or her motivated action to persist. Third, distance learners' experiential motivation involves a refractive process. To understand distance leaners' refraction means to understand how they make sense of their learning experiences in ODL, i.e., learners' subjective understanding of a learning experience. In this context, as Vygotsky argues (1994), it is important to locate the factors and conditions derived from distance learners'

personal and social contexts that influence how they interpret their experiences or how these experiences become personally significant or meaningful, hence representing a source of motivation. Locating these constitutional factors in personal and social realms and examining complex interplays between them in relation to a specific learning situation are critical for understanding distance learners' motivation and its origin, changes, and consolidation. In short, from a perezhivanie perspective, distance learners' motivation is not confined solely to personal attributes; neither can it be fully understood by examining exclusively a learning situation or context. Simultaneous assessment of both personal and social realms and their complex transactions distinguishes a perezhivanie perspective for researching motivation from other sociocultural models, such as those discussed in the previous section.

Elaborating the relationship between perezhivanie and identity, Blunden (2016) writes:

> if you were to write a biography of a person, wouldn't you have to connect together the perezhivaniya of their life and demonstrate to the reader who the person was and how they came to be that person – the experiences they had and how they overcame them? And as a writer, you would be unlikely to view the series of life-crises, the experiencing and overcoming of which made the person who they were, to be simply events that happened to the person. (pp. 277–278)

Replacing "a person" in the quote above with "a distance learner" will reveal clearly why perezhivaniya are important for understanding motivation and engagement during the lengthy process of ODL. Inherently, the motivational process in ODL is changeable; distance learners may feel motivated at one time but less so at another time. The concept of perezhivanie facilitates a better understanding of distance learners' evolving motivation (including inconsistencies in motivation) in their lived experiences of learning and refraction across different times and spaces of ODDE. Research attention is required to examine the phenomenon of perezhivanie in ODL with a focus on distance learners' emotionally charged experiences and dramatic events during the protracted journey of distance learning. Crafting such empirical base is critical for unleashing the pedagogical potentials of the generative concept of perezhivanie that Vygotsky turned to shortly before his untimely and premature death that ended his impactful academic life.

Conclusion

ODDE empowers distance learners. A widely accepted aim for ODDE is to offer an alternative pathway or a second chance education for learners who have somehow missed the opportunity in mainstream education. In addition, many ODDE courses, mostly in the higher education sector, aim to provide flexible learning options addressing students' needs and accommodating student diversity. In advancing both aims, how ODL motivates distance learners is critical. If ODL fails to motivate and engage distance learners, it inevitably falls short of its ideal in providing a

second chance education empowering the disadvantaged or offering a flexible option addressing learners' needs.

This chapter discusses motivation theories that conceptualize motivation as individualistic (sociocognitive), contextual (sociocultural), and experiential (perezhivanie), underscoring the importance of several key questions about motivation in ODDE: are distance learners motivated? Are distance learning environments motivating? How do distance learners make sense of their ODL experiences? Each of these theoretical perspectives offers a unique way for researching and promoting motivation, highlighting empowering personal attributes, and motivating contexts and personally meaningful experiences, respectively. Put specifically, sociocognitive theories focus on cognitive enablers that motivated distance learners hold and use to propel their learning. These cognitive enablers provide parsimonious models for understanding distance learners' motivation and for informing the development of engaging instructional designs. Nevertheless, the image of a lone learner working through self-guided correspondence materials is no longer a valid characterization of distance learners in ODDE. ODL has become complex due to advanced technologies that enable asynchronous and synchronous interaction, large enrolments, and increased student diversity. Sociocultural theories of motivation enable a better understanding of motivation that is situated and evolving in these complex contexts of ODDE. Importantly, sociocultural theories have the potential to unravel the enablement of a motivating learning context, highlighting the critical role of motivational support. Finally, a perezhivanie perspective pinpoints the importance of examining how ODL is being experienced and what personal meanings are imbued from different ODL experiences during the protracted journey of learning. This new perspective holds the potential to improve our understanding of distance learners' evolving motivation during the extended process of ODL. In short, the key theoretical perspectives discussed in this chapter, i.e., sociocognitive, sociocultural, and perezhivanie perspectives of motivation, are equally important for ODL and for advancing the goal of empowering distance learners through ODDE.

References

Alario-Hoyos, C., Estévez-Ayres, I., Pérez-Sanagustín, M., Kloos, C. D., & Fernández-Panadero, C. (2017). Understanding learners' motivation and learning strategies in MOOCs. *The International Review of Research in Open and Distance Learning, 18*(3), 119–137.

Andrade, M. S., & Bunker, E. L. (2009). A model for self-regulated distance language learning. *Distance Education, 30*(1), 47–61.

Bandura, A. (1997). *Self-efficacy*. New York, NY: Macmillan.

Bernard, R. M., Brauer, A., Abrami, P. C., & Surkes, M. (2004). The development of a questionnaire for predicting online learning achievement. *Distance Education, 25*, 31–47.

Blunden, A. (2016). Translating perezhivanie into English. *Mind, Culture, and Activity, 23*(4), 274–283.

Cerasoli, C. P., Nicklin, J. M., & Ford, M. T. (2014). Intrinsic motivation and extrinsic incentives jointly predict performance: A 40-year meta-analysis. *Psychological Bulletin, 140*(4), 980–1008.

Chen, F. (2022). Co-development of emotion regulation: shifting from self-focused to child-focused perezhivanie in everyday parent-toddler dramatic collisions. *Early Child Development and Care, 192*(3), 370–383.

Cho, M. H., & Cho, Y. (2017). Self-regulation in three types of online interaction: A scale development. *Distance Education, 38*, 70–83.

Cho, M.-H., & Heron, M. L. (2015). Self-regulated learning: The role of motivation, emotion, and use of learning strategies in students' learning experiences in a self-paced online mathematics course. *Distance Education, 36*, 80–99.

Cho, M.-H., & Shen, D. (2013). Self-regulation in online learning. *Distance Education, 34*, 290–230.

Cowan, J. E., & Menchaca, M. P. (2014). Investigating value creation in a community of practice with social network analysis in a hybrid online graduate education program. *Distance Education, 35*(1), 43–74.

Cropley, A. J., & Kahl, T. N. (1983). Distance education and distance learning: Some psychological considerations. *Distance Education, 4*, 27–39.

Deci, E. L., Koestner, R., & Ryan, R. M. (1999). A meta-analytic review of experiments examining the effects of extrinsic rewards on intrinsic motivation. *Psychological Bulletin, 125*(6), 627.

Dweck, C. S. (1986). Motivational processes affecting learning. *American psychologist, 41*(10), 1040–1048.

Engeström, Y. (1987). *Learning by expanding: An activity-theoretical approach to developmental research*. New York, NY: Cambridge University Press.

Engle, D., Mankoff, C., & Carbrey, J. (2015). Coursera's introductory human physiology course: Factors that characterize successful completion of a MOOC. *The International Review of Research in Open and Distance Learning, 16*(2), 46–68.

Fırat, M., Kılınç, H., & Yüzer, T. V. (2018). Level of intrinsic motivation of distance education students in e-learning environments. *Journal of Computer Assisted Learning, 34*(1), 63–70.

Fung, Y. Y. (2004). Collaborative online learning: Interaction patterns and limiting factors. *Open Learning, 19*(2), 135–149.

Garrison, D. R. (2003). Self-directed learning and distance education. In M. G. Moore & W. G. Anderson (Eds.), *Handbook of distance education* (pp. 161–168). Mahwah, NJ: Erlbaum.

Golombek, P., & Doran, M. (2014). Unifying cognition, emotion, and activity in language teacher professional development. *Teaching and Teacher Education, 39*, 102–111.

González Rey, F. (2011). A re-examination of defining moments in Vygotsky's work and their implications for his continuing legacy. *Mind, Culture, and Activity, 18*(3), 257–275.

Hanewicz, C., Platt, A., & Arendt, A. (2017). Creating a learner-centered teaching environment using student choice in assignments. *Distance Education, 38*, 273–287.

Harackiewicz, J. M., Barron, K. E., & Elliot, A. J. (1998). Rethinking achievement goals: When are they adaptive for college students and why? *Educational Psychologist, 33*(1), 1–21.

Hull, C. L. (1943). *Principles of behavior*. New York, NY: Appleton-Century-Crofts.

Lave, J., & Wenger, E. (1991). *Situated learning*. Cambridge, UK: Cambridge University Press.

Lee, C. Y. (2015). Changes in self-efficacy and task value in online learning. *Distance Education, 36*, 59–79.

Lee, Y., & Choi, J. (2011). A review of online course dropout research: Implications for practice and future research. *Educational Technology Research and Development, 59*, 593–618.

McClelland, D. C. (1963). *The achieving societies*. Princeton, NJ: Van Nostrand.

Ng, C. (2017). Distance learners' multiple goals, learning and achievement in different contexts. *Distance Education, 38*(1), 37–58.

Ng, C. (2018). "I learn for a job promotion!": The role of outcome-focused career goals in motivating distance learners to learn. *Distance Education, 39*(3), 390–410.

Ng, C. (2019). Shifting the focus from motivated learners to motivating distributed environments: A review of 40 years of published motivation research in distance education. *Distance Education, 40*(4), 469–496.

Ng, C. (2021). Subject choice and perezhivanie in mathematics: A longitudinal case study. *Educational Studies in Mathematics, 107*, 547–563.

Ng, C., & Renshaw, P. (2019). An indigenous Australian student's perezhivanie in reading and the evolvement of reader identities over three years. *Learning, Culture and Social Interaction, 22*, 100310.

Nolen, S. B. (2007). Young children's motivation to read and write: Development in social contexts. *Cognition and Instruction, 25*(2-3), 219–270.

Nolen, S. B., Horn, I. S., & Ward, C. J. (2015). Situating motivation. *Educational Psychologist, 50*(3), 234–247.

Nye, A. (2015). Building an online academic learning community among undergraduate students. *Distance Education, 36*, 115–128.

Pajares, F. (1996). Self-efficacy beliefs in academic settings. *Review of Educational Research, 66*(4), 543–578.

Park, S., & Yun, H. (2018). The influence of motivational regulation strategies on online students' behavioral, emotional, and cognitive engagement. *American Journal of Distance Education, 32*(1), 43–56.

Pintrich, P. R., & Schunk, D. H. (2002). *Motivation in education*. Upper Saddle River, NJ: Merrill Prentice Hall.

Puzziferro, M. (2008). Online technologies self-efficacy and self-regulated learning as predictors of final grade and satisfaction in college-level online courses. *American Journal of Distance Education, 22*(2), 72–89.

Remedios, R., & Richardson, J. T. (2013). Achievement goals in adult learners: Evidence from distance education. *British Journal of Educational Psychology, 83*(4), 664–685.

Renshaw, P. (1998). Sociocultural pedagogy for new times: Reframing key concepts. *Australian Educational Researcher, 25*(3), 83–100.

Renshaw, P., & Tooth, R. (2016). Perezhivanie mediated through narrative place-responsive pedagogy. In A. Surian (Ed.), *Open spaces for interactions and learning diversities* (pp. 13–23). Rotterdam, The Netherlands: Sense Publishers.

Rogoff, B. (1990). *Apprenticeship in thinking*. New York, NY: Oxford University Press.

Roth, W.-M. (2017). *The mathematics of mathematics*. Rotterdam, The Netherlands: Sense Publishers.

Ryan, R. M., & Deci, E. L. (2000). Intrinsic and extrinsic motivations: Classic definitions and new directions. *Contemporary Educational Psychology, 25*(1), 54–67.

Salomon, G. (Ed.). (1997). *Distributed cognitions*. Cambridge, UK: Cambridge University Press.

Semenova, T. (2020). The role of learners' motivation in MOOC completion. *Open Learning*, 1–15. https://doi.org/10.1080/01587919.2022.2064823

Simons, J., Leverett, S., & Beaumont, K. (2020). Success of distance learning graduates and the role of intrinsic motivation. *Open Learning, 35*(3), 277–293.

Sivan, E. (1986). Motivation in social constructivist theory. *Educational Psychologist, 21*(3/4), 290–233.

Skinner, B. F. (1971). Operant conditioning. In *Encyclopedia of education* (Vol. 1, pp. 29–33). New York, NY: Macmillan and Free Press.

Stephen, J. S., Rockinson-Szapkiw, A. J., & Dubay, C. (2020). Persistence model of non-traditional online learners: Self-efficacy, self-regulation, and self-direction. *American Journal of Distance Education, 34*(4), 306–321.

Tang, H., Xing, W., & Pei, P. (2018). Exploring the temporal dimension of forum participation in MOOCs. *Distance Education, 39*, 353–372.

Tladi, L. S. (2017). Perceived ability and success: Which self-efficacy measures matter? *A distance learning perspective. Open Learning, 32*(3), 243–261.

Tsai, C. L., Cho, M. H., Marra, R., & Shen, D. (2020). The self-efficacy questionnaire for online learning (SeQoL). *Distance Education, 41*(4), 472–489.

Valsiner, J. (1997). Magical phrases, human development and psychological ontology. In B. D. Cox & C. Lightfoot (Eds.), *Sociogenetic perspectives on internalization* (pp. 237–255). Mahwah, NJ: Erlbaum.

Vayre, E., & Vonthron, A. M. (2017). Psychological engagement of students in distance and online learning: Effects of self-efficacy and psychosocial processes. *Journal of Educational Computing Research, 55*(2), 197–218.

Veresov, N., & Fleer, M. (2016). Perezhivanie as a theoretical concept for researching young children's development. *Mind, Culture, and Activity, 23*(4), 325–335.

Vygotsky, L. S. (1994). The problem of the environment. In R. Van Der Veer & J. Valsiner (Eds.), *The Vygotsky reader* (pp. 338–354). New York, NY: Plenum Press.

Walker, R. A. (2010). Sociocultural issues in motivation. In P. Peterson, E. Baker, & B. McGaw (Eds.), *International encyclopedia of education* (3rd ed., pp. 712–717). Oxford, UK: Elsevier.

Wenger, E. (1998). *Communities of practice*. New York, NY: Cambridge University Press.

Zimmerman, B. J. (1989). A social cognitive view of self-regulated academic learning. *Journal of Educational Psychology, 81*, 329–339.

Zimmerman, B. J., & Martinez-Pons, M. (1986). Development of a structured interview for assessing student use of self-regulated learning strategies. *American Educational Research Journal, 23*(4), 614–628.