

UNIVERSIDADE DE SÃO PAULO

Instituto de Ciências Matemáticas e de Computação

**Gamification of Collaborative Learning Scenarios: An
Ontological Engineering Approach to Deal with the Motivation
Problem Caused by Computer-Supported Collaborative
Learning Scripts**

Geiser Chalco Challco

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Geiser Chalco Challco

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Doctoral dissertation submitted to the Institute of Mathematics and Computer Sciences – ICMC-USP, in partial fulfillment of the requirements for the degree of the Doctorate Program in Computer Science and Computational Mathematics. *EXAMINATION BOARD PRESENTATION COPY*

Concentration Area: Computer Science and Computational Mathematics

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Geiser Chalco Challco

**Gamificação de Cenários de Aprendizagem Colaborativa:
Uma Abordagem de Engenharia de Ontologias para Lidar
com o Problema de Motivação Causado por Scripts de
Aprendizagem Colaborativa Suportados por Computador**

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Orientadora: Prof. Dr. Seiji Isotani

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INTRODUCTION

This chapter starts with the context and delimitation of research problem ([section 1.1](#)). After that, the chapter formulates the research questions and objectives ([section 1.2](#)). The research methodology is presented in [section 1.3](#). The thesis statement and contributions are presented in [section 1.4](#). The chapter ends with the structure of this dissertation ([section 1.5](#)).

1.1 Context and Problem Delimitation

Over the last two decades or so, with the growing number of technologies that enable people to communicate and work in group activities using computers and Internet, researchers and practitioners have developed technology and software applications that facilitate and foster the Collaborative Learning (CL) ([LEHTINEN *et al.*, 1999](#)). Such technology and the research field that studies how to effectively link together the advanced in computer science with the collaborative learning is known as Computer-Supported Collaborative Learning (CSCL), and it has been proved an important to support the learning process of students by cognitive, social and technological reasons ([STAHL; KOSCHMANN; SUTHERS, 2006](#)). However, CSCL is only beneficial when there is an adequate design establishing the way in which the collaboration should happen ([DILLENBOURG, 2013; HEWITT, 2005; ISOTANI *et al.*, 2009](#)). Students frequently fail to be engaged in productive learning interactions when they are left to interact in CL activities without any support. Hence, several researchers propose the use of scripts to guide and orchestrate the collaboration among students ([ALHARBI; ATHAUDA; CHIONG, 2014](#)).

Scripted collaboration aims to engage the students in fruitful and meaningful interactions according to a design that has the purpose to attain a set of pedagogical objectives. Thereby, CSCL scripts have been proposed by the community to support the well-thought-out design of the CL scenarios by means of computer-based systems ([FISCHER *et al.*, 2013; KOBBE *et al.*, 2007](#)). These scripts are the technology that describes how the interactions among students will be orchestrated in a group activity to increase the possibility of achieving the pedagogical

objectives (WEINBERGER *et al.*, 2005). These scripts provide information that facilitates the group formation, the role distribution, and the sequencing of interaction for the participants of a CL activity. Despite of these benefits, there are situations in which the scripts may cause motivation problem. Sometimes, a learner does not want to play the role assigned by the scripts, and he may neglect his personal behavior to get the task completed without effort and, other times, the lack of choice over the sequence of interactions may produce in the students a sense of obligation in complete an unwilling activity (CHALLCO *et al.*, 2014; ISOTANI, 2009). These issues may negatively influence the students' motivation, learning attitudes and behaviors, degrade the classroom group dynamics, and result in long-term and widespread negative learning outcomes (CHALLCO *et al.*, 2014; FALOUT; ELWOOD; HOOD, 2009)

The motivation problem caused by the scripted collaboration makes more difficult the use of CSCL technology over time. In fact, less motivated students prefer to spend more time in other activities rather than to learn and, as consequence, the achievement of expected learning outcomes becomes difficult (CROOK, 2000; SCHOOR; BANNERT, 2011). In this sense, motivating learners in the entire instructional process of CL is important. However, the traditional instructional design practice assumes that the motivation is a simple preliminary step that must happen before the instruction (CHAN; AHERN, 1999; KELLER, 1987). This assumption is based in which the good quality of learning materials can keep the students focused during the learning process, but if this process is long, there is a good chance that the students will lose their initial attention. To solve this problem, several approaches, such as the use of affective feedbacks based on emotion-aware (FEIDAKIS *et al.*, 2014b; FEIDAKIS *et al.*, 2014a), peer learning companions (WOOLF *et al.*, 2009), and so on, have been proposed to motivated students along the entire instructional process. These solutions assume that the students like the content-domain and/or have the desired to learn, so that students that do not have the desire to learn are not motivated and engage for these approaches.

In the last years, efforts of CSCL community have been directed to finding new innovative solutions that, beside to motivate and engage students during the entire CL process, are not completely tied to the domain-content and desired to learn the domain-content. In this direction, several researchers and practitioners have pointed Gamification as a promising technology to deal with motivation problem in the instructional/learning domain (CHALLCO *et al.*, 2014; SEABORN; FELS, 2015; de Sousa Borges *et al.*, 2014). Gamification defined "*as the use of game design elements in non-game contexts*" (DETERDING *et al.*, 2011) aims to increase the students' motivation and engagement by making the learning process more game-like. This is done through the introduction of game elements, such as points, leaderboards, competition, cooperation and so on. These elements are not part of the domain-content, neither they belong to the instructional/learning process, so that they can even motivate students who do not have the desire and/or interest in to learn the content-domain. These game elements are introduced along the entire learning process, so that the benefits of gamification strongly depend on how well these game elements are applied, and how well they are linked with the pedagogical approaches

(KAPP, 2012; KNUTAS *et al.*, 2014b).

When CL scenarios are gamified to deal with the motivation problem caused by the scripted collaboration, the author of this thesis hypothesizes that the chances to achieve engagement and educational benefits will be increased whether there is a proper connection between the game elements and the CL process. Nevertheless, developing such well-thought-out gamified CL scenario, hereinafter referred to as gamified CL scenarios, is not trivial. The main difficulty to gamify CL scenarios as well as other non-game context is that the gamification is too context dependent (HAMARI; KOIVISTO; SARSA, 2014; RICHARDS; THOMPSON; GRAHAM, 2014). Its effects vary individual to individual, and they depend of many factors such as the individual personality traits, preferences, and current students' emotions (NICHOLSON, 2015; PEDRO *et al.*, 2015) (e.g., a user who likes competition would be more motivated by a leaderboard rather than a user who want to obtain items to customize his/her avatar). Also, the expected effects of the game elements vary according to context and the target behavior that is being gamified (DETERDING *et al.*, 2013; HEETER *et al.*, 2011) (e.g., gamifying a learning scenario to promote the sign-up of participants is not the same that gamifying an interactive environment to maintain the students attention). As consequence of this context-dependency, when a CL scenario is not well gamified, instead to have a positive effect, they may cause a detrimental on the students' motivation (ANDRADE; MIZOGUCHI; ISOTANI, 2016), cheating (NUNES *et al.*, 2016), embarrassment (OHNO; YAMASAKI; TOKIWA, 2013), and lack of credibility on badges (DAVIS; SINGH, 2015).

Another difficulty to gamify CL scenarios, as well as other non-game contexts, it is the lack of approaches to systematically represent, in an unambiguous way, the gamification knowledge acquired in the last years by researchers and practitioners. This knowledge constituted by theories and best practices related to gamification lacks of a formal and common vocabulary, definitions, and representation to apply gamification. As can be appreciated in the current literature of gamification (DICHEVA *et al.*, 2015; HAMARI; KOIVISTO; SARSA, 2014; MORA *et al.*, 2015; SEABORN; FELS, 2015), each author proposes his/her own definitions, classifications and representation to describe the concepts and characteristics about how to gamify a non-game context. This fact hinders the creation of models and/or frameworks that formally represent the gamification and its application by computer-based systems in a common understandable and sharable manner, and to the best of the thesis author's knowledge, there are no one approaches has been proposed to represent the knowledge about how to gamify CL scenarios to deal with the motivation problem caused by the scripted collaboration.

Due to the variety of students who can participate in CL sessions, the diversity of subjects that can be under study in a CL activity, and the range of different CSCL scripts that can be used to orchestrate the CL process, it is necessary to personalize the gamification, providing a tailored gamified CL scenario for each situation. This task is difficult and time-consuming, so that developing a computational based-support in intelligent-theory aware systems to give

assistance with the personalization of gamification is very helpful and necessary. In this direction, in the context of CSCL, one interesting solution has been proposed to gamify CL scenarios using adaptive profiles and machine learning techniques (KNUTAS *et al.*, 2014a; KNUTAS *et al.*, 2014b). However, this solution is not oriented to deal with the motivation problem caused by the scripted collaboration, its purpose is to increase the communication among the participants in CL scenarios. Furthermore, this solution falls into the category of computer-based mechanisms and procedures that support the gamification, it does not provide a model to share the theoretical knowledge related to gamification obtained by this computer-based mechanism. Solutions based on machine learning to personalize gamification require a lot of data to support the personalization of gamification, and they may have overfitting or underfitting problem with the data. A computer mechanism based only in machine learning techniques to personalize gamification lacks of theoretical-justification to explain why a game element is introduced, and why a certain configuration of game elements increases the motivation participants in a CL scenario.

For the reason exposed above, to deal with the motivation problem caused by the scripted collaboration through the gamification of CL scenarios, a computational support with a common and shareable structure to describe knowledge extracted from the best practices and theories related to gamification is essential to overcome the challenges and difficulties of gamification. In the direction to make explicit the knowledge contained in computer-based mechanisms and procedures, ontologies have been consolidated as the most advanced technology to support the representation of knowledge in a common computer-understandable and sharable manner (ASIKRI *et al.*, 2016; DEVEDŽIC, 2006; MIZOGUCHI; BOURDEAU, 2016). Ontologies constitute an explicit mapping between the target world of interest and its representation with the purpose to describe concepts without ambiguities providing a common way to represent the knowledge (GUARINO; OBERLE; STAAB, 2009). Taking advantages of this commonality, and using the computer interconnection technologies such as Internet, computer-based mechanisms in intelligent systems use ontologies to share understandings and interpretations of target world. In this direction, employing ontologies, some interesting and practical results have been obtained in the formalization and organization of knowledge extracted from different theories and practices related to gamification (DERMEVAL *et al.*, 2016; KARKAR; JA'AM; FOUFOU, 2016; ZOUAQ; NKAMBOU, 2010). However, currently, there is no one ontology that allows the description of fundaments concepts extracted from the best practices and theories related to gamification, and how these concepts are applied in CL scenarios to deal with the motivation problem caused by the scripted collaboration.

Therefore, the general research goal in this PhD thesis dissertation refers to the definition of an ontology to, from a philosophical perspective, systematically formalize the knowledge extracted from the best practices and theories related to gamification, and the definition of computer-based mechanisms that employ this ontology to deal with the motivation problem caused by the scripted collaboration in CL activities where the CSCL scripts are used as a method

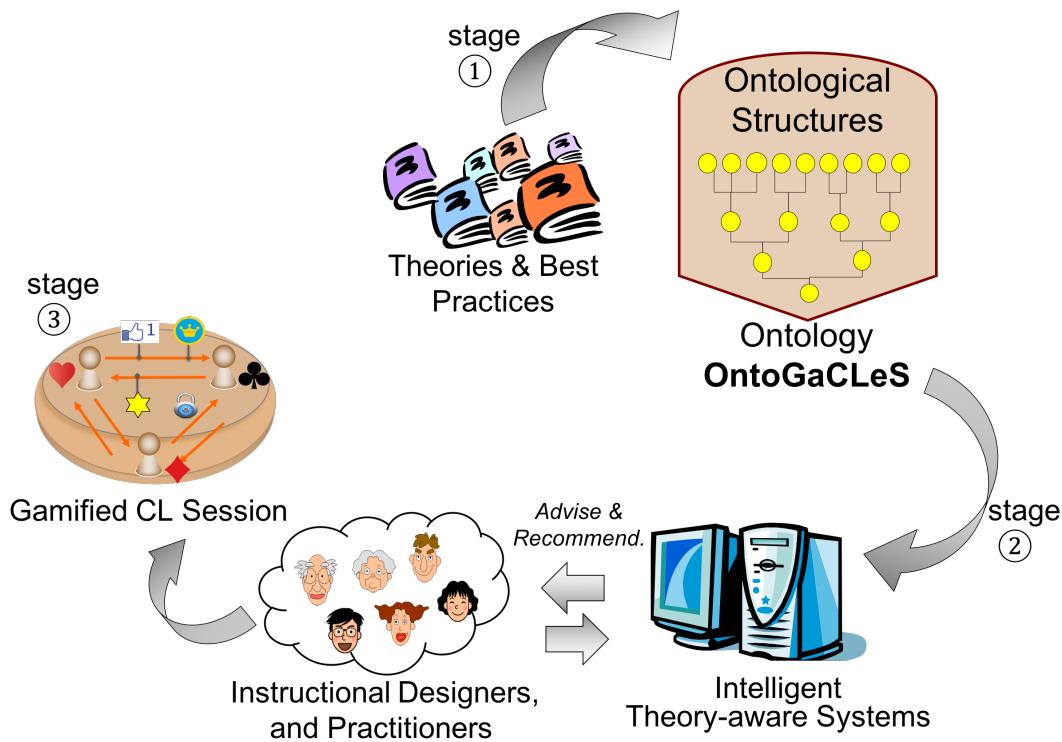
to orchestrate and structure the collaboration among students.

1.2 Research Questions and Research Objectives

The overarching research question (**RQ**) answered in this PhD thesis dissertation is: “*How can gamification and ontologies be used to deal with the motivation problem caused by the scripted collaboration in CL activities where CSCL scripts are used as a method to orchestrate and structure the collaboration among students?*”

To answer this research question, the author of this thesis proposes the ontological engineering approach to gamify CL scenarios shown in [Figure 1](#). This approach consists into three major stages described as follows:

Figure 1 – Ontological engineering approach to gamify CL scenarios



Source: Elaborated by the author.

1. The first stage is the formalization of the necessary knowledge about how to gamify CL scenarios for dealing with the motivation problem caused by the scripted collaboration into an ontology named **OntoGaCLEs – Ontology to Gamify Collaborative Learning Scenarios**. This ontology has been developed using ontology engineering in which, by extracting concepts from the theories and practices related to gamification, the author of this thesis defines a set of ontological structures that enables the systematic formalization and representation of necessary knowledge to gamify CL scenarios.

2. The second stage is the development of computer-based mechanisms and procedures whereby intelligent theory-aware systems will provide support in the gamification of CL scenarios to deal with the motivation problem caused by the scripting collaboration. Such support is given by the knowledge formalized in the ontology OntoGaCLEs during the first stage, and the purpose of the computer-based mechanisms is to use this knowledge to facilitate the tasks of instructional designer and practitioners, especially novice users, in the gamification of CL scenarios. This knowledge provides theoretical justification for the personalization of gamification and, thus, to obtain tailored gamified CL sessions adapted for each situation. Such sessions are known as ontology-based CL sessions, and they are CL scenarios that have been gamified and instantiated at the most concrete level by detailing the participants and content-domain to be directly run in a learning environment.
3. The third stage is the validation of the ontological engineering approach to gamify CL scenarios as a method to deal with the motivation problem caused by the scripted collaboration. This validation is carried out in ontology-based gamified CL sessions obtained by the approach, and it consists in measuring the effectiveness and efficiency of these sessions for dealing with the motivation problem caused by the scripted collaboration. The effectiveness and efficiency were measured by comparing the effects on students' motivation and learning outcomes caused by ontology-based CL sessions, non-gamified CL sessions and CL sessions gamified without using the support given by the ontology OntoGaCLEs.

Regarding to the formalization of knowledge about how to gamify CL scenarios for dealing with the motivation problem caused by the scripted collaboration (Stage 1), the research questions answered by this dissertation are:

RQ1: Which concepts from the theories and practices related to gamification should be taking into account to deal with the motivation problem caused by the scripted collaboration? and How should these concepts be applied in the gamification of CL scenarios?

RQ2: How can the concepts extracted from the theories and best practices related to gamification, and identified as relevant to deal with the motivation problem caused by the scripted collaboration, be represented as ontological structures?

Regarding to the development of computer-based mechanisms and procedures whereby intelligent theory-aware systems will provide support in the gamified CL scenarios using the knowledge described in the ontology OntoGaCLEs (Stage 2), the research questions answered by this dissertation are:

RQ3: What computer-based mechanisms and procedure are necessary in intelligent-theory aware systems to give a helpful support in the gamification of CL scenarios? and How can

the knowledge encoded in the ontology OntoGaCLeS be used by these mechanisms and procedures for dealing with the motivation problem caused by the scripted collaboration?

Regarding to the validation of the ontological engineering approach to gamify CL scenarios as a method to deal with the motivation problem caused by the scripted collaboration (Stage 3), the research questions answered by this dissertation are:

RQ4: What are the effects of ontology-based gamified CL sessions on the students' motivation and learning outcomes? and What are the effectiveness and efficiency of these sessions to deal with the motivation problem caused by the scripted collaboration?

The research objectives pursued to answer the research questions *RQ1* and *RQ2* are:

RO1: To review the scientific literature in order to identify the most relevant concepts from the theories and practices related to gamification that should be taking into account to deal with the motivation problem caused by the scripted collaboration, and how these concepts be applied in the gamification of CL scenarios; and

RO2: To define the necessary ontological structures to represent the concepts identified as relevant in the scientific literature of gamification to deal with the motivation problem caused by the scripted collaboration.

In order to answer the research question *RQ3*, the research objectives is:

RO3: To identify and define the computer-based mechanisms and procedures that must be implemented by intelligent-theory aware systems to give a helpful support in the gamification of CL scenarios, and how these mechanisms and procedure use the knowledge encoded in the ontology OntoGaCLeS for dealing with the motivation problem caused by the scripted collaboration.

The research objective pursued to answer the research question *RQ4* is:

RO4: to analyze the effects of ontology-based gamified CL sessions on the students' motivation and learning outcomes for the purpose of validating the ontology engineering approach to gamify CL scenarios in reference to the effectiveness and efficiency to deal with the motivation problem caused by the scripted collaboration.

It is out of scope in this dissertation to deal with the following objectives:

- To compare, validate or judge the best practices and theories related to gamification.

- To create, modify or extend the concepts described in the best practices and theories related to gamification.
- To create a generic and complete representation of all concepts described in the practices and theories related to gamification. The author of this thesis only concentrates on the formalization of the minimal necessary concepts from these practices and theories to deal with the motivation problem caused by the scripted collaboration.
- To validate the concepts and ontological structures formalized in the ontology OntoGaCLEs using semantic reasoner engines or formal methods based on logic and/or mathematics.

1.3 Research Methodology

As this PhD thesis dissertation is framed in the multidisciplinary field of CSCL with research questions and research objectives oriented to be answered and achieved by theoretical and empirical studies, a mixed research method needs to be employed to conduct this research. Following the research methodology framework proposed by [Glass \(1995\)](#), [Glass, Vessey and Ramesh \(2002\)](#), the mixed research method employed in this PhD thesis research consists in four iterative phases: informational, propositional, analytical and evaluation.

Informational phase: In this phase, the research problems and potential solutions were identified based on information gathered from the scientific literature and discussions with experts in fields of CSCL, gamification and ontology engineering. The results of this phase were an outline of the knowledge involved in this dissertation, the research questions, and the research objectives. The tasks carried out in this phase correspond to tasks extracted from the scientific (observing the world) and engineering (observing existing solutions) research methods. These tasks were:

- The search, review and analysis of scientific literature regarding to: CSCL, gamification and ontology engineering. This literature review was performed with emphasis in scripted collaboration, gamification of learning and instruction, and ontology-engineering applied to Artificial Intelligence in Education (AIED).
- The participation as member of the research group in Applied Computing in Education Laboratory (CAEd-Lab, *Laboratorio de Computação Aplicada a Educação e Tecnologias Sociales Avançadas*) at the University of São Paulo. Particularly, the expertise field in CSCL and Ontologies of this research group has been very important and valuable to conduct the research and the literature reviews.
- The participation in several conferences and workshops related to the context and problem domain in which this dissertation is framed. These conferences and workshop, in chronological order, were: the III Escola de Ontologias UFAL-USP, 2014

(Workshop); the 20th International Conference on Collaboration and Technology, CRIWG, 2014 (Conference), the Summer School on Computers in Education, 2015 (Workshop); the XXVI Brazilian Symposium on Computers in Education, 2015 (Conference); the 6th Latin American School for Education, Cognitive and Neural Sciences, 2016 (Workshop); and the Higher Education for All: International Workshop on Social, Semantic, Adaptive and Gamification techniques and technologies for Distance Learning, 2017 (Workshop).

- The participation as visiting research at the Research Center for Service Science at the School of Knowledge Science in the Japan Advanced Institute of Science and Technology (JAIST) has also been significant for the informational phase. This research center is dedicated to study, design and implementation knowledge co-creation process in complex service systems. This research center focuses in the use of ontologies and ontology-engineering as the technology to develop and solve a broad variety of domains/tasks, and their research members have a long history working in the research field of Artificial Intelligence in Education. Particularly, the expertise of the Prof. Mitsuro Ikeda and Prof. Riichiro Mizoguchi were valuable and important for this phase due to their involvement in various research projects related to the modeling of knowledge for the students' learning growth, CL process, and instructional design.

Propositional phase: In this phase, solutions were proposed and formulated using the information gathered in the previous phase. As results of the propositional phase, constructors of necessary concepts to gamify CL scenarios were identified and proposed as ontological structures in the ontology OntoGaCLEs. Prototypes of computer-based mechanisms and procedures were also developed for gathering practitioner and user opinions as early feedback of these systems. The tasks carried out in this phase correspond to task extracted from the scientific (proposing theories or models) and engineering (proposing and developing solutions) research methods. These tasks were:

- The proposal of ontological structures in the ontology OntoGaCLEs to represent gamified CL scenarios and ontological models to personalize the gamification of CL scenarios based on player type models and need-based theories of motivation.
- The proposal of ontological structures in the ontology OntoGaCLEs to represent the application of persuasive game design models in gamified CL scenarios and ontological models to apply persuasive game strategies as a method for dealing with the motivation problem caused by the scripted collaboration.
- The proposal of a computer-based model to unify the modeling of the learners' growth process and the flow theory based on the principle of good balance between the perceived challenges and skills.

- The definition of a conceptual flow to gamify CL scenarios as a computer-based procedure to use the knowledge described in the ontology OntoGaCLeS, and the definition of a reference architecture based on this flow to build computer-based mechanisms that provide support in intelligent-theory aware systems for dealing with the motivation problem caused by the scripted collaboration.

Analytical phase: This phase consists into analyze and explore the solutions formulated in the propositional phase with the purpose to identify whether the proposed solutions are understandable, how them can be deployed into practice, what are the potential problems in understanding and using them, and whether there are any omissions or gaps in these solutions. The tasks carried out in this phase correspond to task extracted from the empirical (applying to case studies) and analytical (developing new solutions derived from the results obtained in the case studies) research methods. These tasks were:

- The formalization of an ontological model to personalize the gamification of CL scenarios based on the Dodecad player type model proposed by [Marczewski \(2015b\)](#), and the formalization of an ontological model to personalize the gamification of Cognitive Apprentice CL scenarios based on the Yee's player type model. These two formalizations were developed as case studies to validate in the evaluation phase the ontological structures proposed to systematically formalize ontological models to personalize the gamification of CL scenarios.
- The formalization of an ontological model to apply gamification as a persuasive technology in gamified Cognitive Apprenticeship scenarios employing the persuasive game design strategies defined in the Model-driven persuasive game proposed by [Orji \(2014\)](#).
- The implementation of a computer-based mechanism (as a proof of concept) in which the knowledge encoding in the ontology OntoGaCLeS is used for setting up the proper player roles and game elements for CL sessions.
- The development of an algorithm (as a proof of concept) to apply the principle of good balance between the perceived challenges and skills from the flow theory in the gamification of CL scenarios.
- The development of a computer-based mechanisms (as a proof of concept) to apply gamification as persuasive technology in the gamification of CL scenarios.

Evaluation phase: The focus of this phase is to conduct empirical tests and evaluations for the solutions formulated in the propositional phase and for the findings found in the analytical phase. In this phase, the empirical data gathered through the tests and evaluations aim to assess the contributions from different perspectives. The task carried out in this phase correspond to task from the empirical (validating the solutions) and analytical (analyzing the results obtained from empirical observations) research methods. These tasks were:

- The analytical evaluation of the ontological structures proposed to represent gamified CL scenarios and the ontological models to personalize the gamification of CL scenarios. This evaluation was carried out by publishing these ontological structures and the ontological models obtained from them in the analytical phase (the ontological model to personalize gamification in CL scenarios based on the Dodecad player type model, and the ontological model to personalize gamification in Cognitive Apprentice CL scenarios based on the Yee's player type model) as scientific articles in conferences and journals related to the fields of CSCL, and Artificial Intelligent in Education. These articles, in chronological order, were: "*Towards an Ontology for Gamifying Collaborative Learning Scenarios*" published in the 12th International Conference on Intelligent Tutoring Systems, ITS, 2014; "*An Ontology Engineering Approach to Gamify Collaborative Learning Scenarios*" published in the 20th International Conference on Collaboration and Technology, CRIWG, 2014; and "*Personalization of Gamification in Collaborative Learning Contexts using Ontologies*" published in the journal of IEEE Latin America Transactions, 2015. During the conferences important feedbacks to improve the ontological structures were obtained from informal discussions with the participants of the conferences who shared their expertise in the domain of CSCL and Artificial Intelligent in Education.
- The analytical evaluation of the ontological structures proposed to represent the application of persuasive game design models in gamified CL scenarios and the ontological models to apply persuasive game strategies as a method for dealing with the motivation problem caused by the scripted collaboration. This evaluation was carried out by publishing these ontological structures and the ontological models obtained from them in the analytical phase (the ontological model to apply gamification as a persuasive technology in gamified Cognitive Apprenticeship scenarios employing the persuasive game design strategies defined in the Model-driven persuasive game) as scientific articles scientific articles in conferences and journals related to the fields of CSCL, and Artificial Intelligent in Education. These articles, in chronological order, were: "*Steps Towards the Gamification of Collaborative Learning Scenarios Supported by Ontologies*" published in the 17th International Conference on Artificial Intelligence in Education, AIED, 2015; "*An Ontological Model to Apply Gamification as Persuasive Technology in Collaborative Learning Scenarios*" published in the 26th Brazilian Symposium of Informatics in Education, SBIE, 2015; "*Gamification of Collaborative Learning Scenarios: Structuring Persuasive Strategies Using Game Elements and Ontologies*" published in the 1st International Workshop of Social Computing in Digital Education, SOCIALEDU, 2015; and "*An Ontology Framework to Apply Gamification in CSCL Scenarios as Persuasive Technology*" published in the Brazilian Journal of Computers in Education, 2016. During the conferences important feedbacks to improve the ontological structures were obtained from informal

discussions with the participants of the conferences who shared their expertise in the domain of CSCL and Artificial Intelligent in Education.

- The conduction of a pilot empirical study in which, prior to carry out the full-scale empirical studies, the activities, methods, instruments and activities that have been used in the full-scale studies were evaluated to adjust and improve the full-scale study design. This empirical study has been conducted to assess the effectiveness of *the ontological engineering approach to gamify CL scenarios* for dealing with the motivation problem caused by the scripted collaboration. Such effectiveness is measured by comparing the effect of the ontology-based CL sessions obtained by the approach against the effect of non-gamified CL sessions on the participants' intrinsic motivation and learning outcomes, and the percentage of participation by groups. This empirical study was conducted with undergraduate computer science students at the university of São Paulo during the second semester of 2016 in the course of Laboratory of Introduction to Computer Science, and for a CL activity related to the topic of loop structures. In such CL activity, the ontology-based gamified sessions and non-gamified CL sessions have been instantiated using a CSCL script inspired by the cognitive apprenticeship theory as the method to orchestrate and structure the collaboration among the students.
- The conduction of a full-scale empirical to evaluate the effectiveness of *the ontological engineering approach to gamify CL scenarios*. This effectiveness has been measured by comparing the effects of ontology-based gamified CL sessions against the effects of non-gamified CL sessions on the participants' intrinsic motivation and learning outcomes. This study was carried out in the course of introduction to computer science with undergraduate computer engineering students at the university of São Paulo during the first semester of 2017. The CL activity in which these CL sessions have been instantiated was related to the topic of condition structures using a CSCL script based on the cognitive apprentice theory to orchestrate and structure the collaboration among the participants.
- The conduction of a full-scale empirical study to also evaluate the effectiveness of *the ontological engineering approach to gamify CL scenarios*. However, in this empirical study, the effects of ontology-based gamified CL sessions against the effect of non-gamified CL sessions were compared on the participants' level of motivation instead to compare these effects on the participants' intrinsic motivation. This empirical study was carried out during the first semester of 2017 in the course of Introduction to Computer Science at the university of São Paulo with undergraduate computer engineering students. In this context, a CSCL script inspired by the cognitive apprentice theory was used to structure and orchestrate the collaboration among the students a CL activity related to the the topic of loop structures.
- The conduction of a full-scale empirical study to evaluate the efficiency of *the onto-*

logical engineering approach to gamify CL scenarios for dealing with the motivation problem caused by the scripted collaboration. Such efficiency was measured by comparing the effects on the participants intrinsic motivation, level of motivation, and learning outcomes caused by ontology-based CL sessions against the effects caused by CL sessions that have been gamified without using the support given by the ontology OntoGaCLEs. This empirical study was carried out in the course of Introduction to Computer Science at the university of São Paulo during the first semester of 2017. The undergraduate computer engineering students signed up in this course participated in a CL activity related to the topic of recursion in which the collaboration among the students was orchestrated and structured by a CSCL script inspired by the cognitive apprentice theory.

1.4 Thesis Statement and Claimed Contributions

The thesis statement of this PhD thesis dissertation is that:

“For CL activities where the CSCL scripts are used as a method to orchestrate and structure the collaboration among the participants, the gamification of CL scenarios using the support given by the ontology OntoGaCLEs constitutes an effective and efficient solution to deal with the motivation problem caused by the scripted collaboration because this ontology encodes the necessary theoretical knowledge related to theories and best practices of gamification to perform this task.”

The claimed contributions are:

1. The identification of most relevant concepts from the theories and practices related to gamification that should be taking into account to deal with the motivation problem caused by the scripted collaboration (RO1).
2. Ontological structures that represent the concepts identified as relevant in the theories and practices related to gamification for dealing with the motivation problem caused by the scripted collaboration (RO2).
 - a) A set of ontological structures to represent gamified CL scenarios and ontological models to personalize the gamification of CL scenarios based on player types models and need-based theories of motivation.
 - b) A set of ontological structures to apply persuasive game design models in gamified CL scenarios and ontological models to apply persuasive game strategies as a method for dealing with the motivation problem caused by the scripted collaboration.

- c) A unify modeling of learners' growth process and flow theory as a computer-based model to apply the principle of good balance between the perceived challenges and skills for gamified CL scenarios.
- 3. A conceptual flow to gamify CL scenarios using the knowledge described in the ontology OntoGaCLeS, and a reference architecture based on this flow to build computer-based mechanisms that provide support in intelligent-theory aware systems for dealing with the motivation problem caused by the scripted collaboration (RO3).
- 4. An empirical evaluation of *the ontological engineering approach to gamify CL scenarios* in which, to validate the effectiveness and efficiency of this approach for dealing with the motivation problem caused by the scripted collaboration, the effects of ontology-based gamified CL sessions on students' intrinsic motivation, level of motivation and learning outcomes are compared against the effects caused by the non-gamified CL sessions and CL sessions that have been gamified without using the support given by the ontology OntoGaCLeS (RO4).

1.5 Structure of the Dissertation

This PhD thesis dissertation is structured in eight chapters:

Chapter 1: *Introduction*

Chapter 2: *General Background and Fundamental Concepts* contains the background related to the context and research problem addressed in this dissertation. An overview related to the fields of CSCL and scripted collaboration, gamification and ontology engineering are presented in the chapter. The motivation problem caused by the scripted collaboration, and the current approaches to deal with this problem are also detailed in the chapter. The concepts that were identified as relevant in the theories and practices of gamification and their difficulties to apply it in CL scenarios for dealing with the motivation problem caused by the scripted collaboration are presented in the chapter.

Chapter 3: *Ontological Structure to Personalize the Gamification in CL Scenarios* describes the ontological structures, that have been proposed by the author of this thesis, and that have been formalized in the ontology OntoGaCLeS, to represent gamified CL scenarios and ontological models to personalize the gamification in CL scenarios based on player types models and need-based theories of motivation. The chapter also shows the procedure followed to build an ontological model ontological model to personalize the gamification of CL scenarios based on the Dodecad player type model.

Chapter 4: *Ontological Structures of Persuasive Game Design in CL Scenarios* describes the ontological structures proposed by the author of this thesis to apply persuasive game

design models in gamified CL scenarios and to represent ontological models to apply persuasive game strategies as a method for dealing with the motivation problem caused by the scripted collaboration. The chapter also describes the procedure to formalize an ontological model in which gamification is applied as persuasive technology for gamified Cognitive Apprenticeship scenarios employing the persuasive game design strategies defined in the Model-driven persuasive game proposed by [Orji \(2014\)](#).

Chapter 5: *A Unify Modeling of Learners' Growth Process and Flow Theory* presents the computer-based model proposed by the author of this thesis to unify the modeling of the learners' growth process and the flow theory based on the principle of good balance between the perceived challenges and skills. This model has been used in the gamification of CL scenarios through an algorithm in which this principle is used to define the level of rewards. This algorithm as a proof of concept for the computer-based model to unify the modeling of learners' growth process and flow theory is also presented in the chapter.

Chapter 6: *Computer-based Mechanisms and Procedures to Gamify CL Scenarios* describes the flow proposed by the author of this thesis to use the knowledge described in the ontology OntoGaCLEs to gamify CL scenarios. The reference architecture based on this flow by which computer-based mechanisms could be built in intelligent-theory aware systems to provide support in the gamification of CL scenarios for dealing with the motivation problem caused by the scripted collaboration is presented in the chapter. The chapter also describes the computer-based mechanisms that has been developed by the author of this thesis using the reference architecture to conduct the evaluation of the ontological engineering approach to gamify CL scenarios.

Chapter 7: *Evaluation of the Ontological Engineering Approach to Gamify CL Scenarios* presents the empirical studies that have been carried out in real situations to validate the effectiveness and efficiency of this approach to deal with the motivation problem caused by the scripted collaboration.

Chapter 8: *Conclusions and Future Work* summarizes the contributions of this PhD thesis dissertation, and the chapter also discusses possible future research directions.



GENERAL BACKGROUND AND FUNDAMENTAL CONCEPTS

CHAPTER
3

ONTOLOGICAL STRUCTURES TO PERSONALIZE THE GAMIFICATION IN COLLABORATIVE LEARNING SCENARIOS

This chapter presents the formalization of ontological structures that have been proposed by the author of this thesis dissertation to represent gamified CL scenarios. These ontological structures allow us to systematically represent knowledge extracted from player types models and needs-based theories of motivation to deal with the motivation problem caused by the scripted collaboration. This knowledge corresponds to concepts identified by the author of this thesis as relevant to solve the context-dependency related to the individual user characteristics, so that the ontological structures described in this chapter are also used to represent ontological models to personalize the gamification in CL scenarios based on player types models and need-based theories of motivation. The ontological structures to represent gamified CL scenarios have been developed as an extension of ontological structures proposed to represent CL scenarios in the CL ontology, hence the chapter starts with an overview of the CL ontology ([section 3.1](#)). The ontological structures that have been formalized in the *Ontology to Gamify Collaborative Learning Scenarios - OntoGaCLeS* to represent gamified CL scenarios based on the knowledge extracted from player types models and needs-based theories of motivation are presented in [section 3.2](#). To demonstrate the usefulness of this formalization, and then to validate the ontological structures as a formal representation of ontological models to personalize the gamification in CL scenarios, [section 3.3](#) shows the procedure followed to build an ontological model to personalize the gamification of CL scenarios based on the Dodecad player type models ([MARCZEWSKI, 2015b](#)).

Part of the work described in this chapter was published by the author of this PhD thesis dissertation in the scientific articles:

- “*Towards an Ontology for Gamifying Collaborative Learning Scenarios*” published in the

12th International Conference on Intelligent Tutoring Systems, ITS 2014, held in Honolulu, HI, USA ([CHALLCO et al., 2014](#)).

- “*An Ontology Engineering Approach to Gamify Collaborative Learning Scenarios*” published in the 20th International Conference on Collaboration and Technology, CRIWG 2014, held in Santiago, Chile ([CHALLCO et al., 2014](#)).
- “*Personalization of Gamification in Collaborative Learning Contexts using Ontologies*” published as Volume 13, Issue 6, in the journal of IEEE Latin America Transactions, 2015 ([CHALLCO et al., 2015](#)).

3.1 Overview of the Collaborative Learning Ontology

The CL ontology has been developed for a long time by the contributions of many researchers. Initially, the CL ontology was conceived to support the opportunistic group formation ([IKEDA; GO; MIZOGUCHI, 1997](#)), so that, to identify situations in which an individual shifting from individual learning mode to CL mode, the CL ontology has been formalized the agreement in the negotiation process for group formation as ontological structures that describe individual and group learning goals. Employing this formalization, intelligent agents have been developed to help students to find group members for establishing group learning activities in which they should participate. These agents check the individual and group learning goals, and then they initiate a negotiation process to establish an agreement of whom participate in group learning activities. This first version of the CL ontology has been demonstrated to be useful in the development of agent-based systems that provide helpful support for the group formation ([INABA et al., 2001; SUPNITHI et al., 1999](#)).

In order to provide theoretical and pedagogical justification for the group formation, the first version of the CL ontology has been extended to represent CL scenario that compliant with instructional and learning theories ([INABA; MIZOGUCHI, 2004; ISOTANI et al., 2013](#)). In this extension, concepts, such as interaction patterns, group goals, individual goals, CL roles and so on, have been formalized from different instructional/learning theories, so that, in addition to support the group formation ([ISOTANI; MIZOGUCHI, 2008](#)), the ontological structures to represent CL scenarios have been successfully applied in: the modeling of learners’ development ([INABA; IKEDA; MIZOGUCHI, 2003](#)) the interaction analysis ([INABA et al., 2002](#)), and the design of CL process ([ISOTANI et al., 2013](#)).

[Figure 2](#) shows the terms, concepts and relations defined in the CL ontology. These concepts are defined as follows as:

I-goal is the individual learning goal that represents what the participant in focus (*I*) is expected to acquire, and it is described as a change in his/her learning stage.

I-role is the CL role played by the participant in focus (*I*).

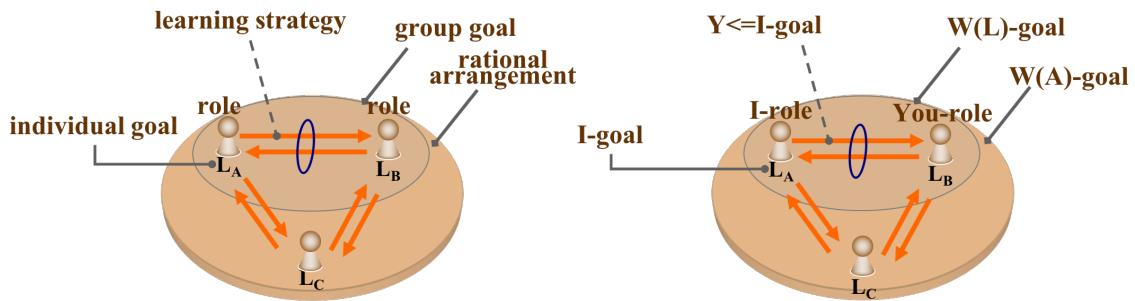
You-role is the CL role played by the participant (*You*) who is interacting with the participant in focus (*I*).

$Y \leq I\text{-goal}$ is the learning strategy employed by the participant in focus (*I*) to interact with the participant (*You*) in order to achieve his/her individual learning goals (*I-goal*).

W(L)-goal is the common learning goal for the group members in the CL scenario.

W(A)-goal is the rational arrangement of the group activity used to achieve the common learning goal (*W(L)-goal*) and the individual learning goals (*I-goal*).

Figure 2 – Concepts, terms and relations defined in the CL Ontology

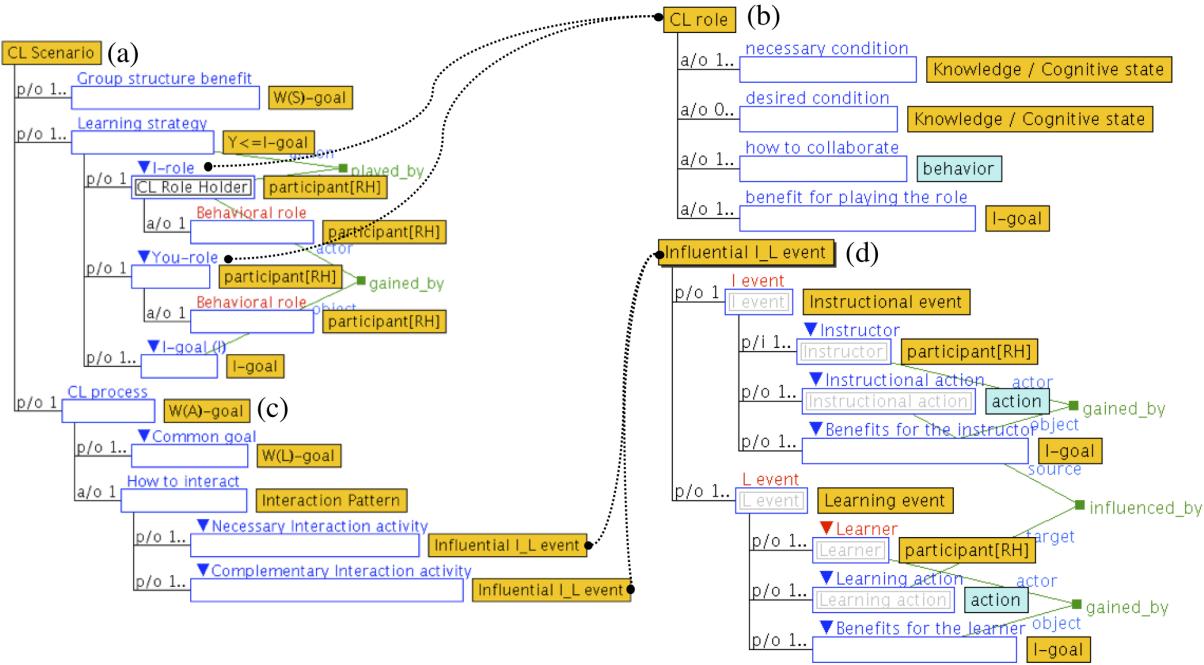


Source: Isotani (2009).

To express the relationship of concepts described above, the CL Ontology employs the ontological structures shown in Figure 3 to represent CL scenarios. In these ontological structures, a CL scenario is represented by three parts defined as: the *Group structure benefit* (*W(S)-goal*) to describe the expected benefits of the structured collaboration (i.e. positive interdependence, individual accountability, promotive interactions); the *Learning strategy* (*$Y \leq I\text{-goal}$*) to describe the learning strategies employed by the group members in the CL scenario; and (3) the *CL process* to describe the rational arrangement of the group activity (*W(A)-goal*).

- (a) The **Learning strategies** (*$Y \leq I\text{-goal}$*) are guidelines that specify how the participants should interact with others members of group to achieve their individual goals. These guidelines help the group members to externalize a desired behavior to play a given CL role more adequately. Therefore, the Learning strategy is represented as an ontological structure composes by: the participant in focus (*I*) who plays the CL role “*I-role*”, the participant (*You*) who interacts with the participant in focus (*I*) playing the CL role “*You-role*,” and the individual learning goals (*I-goal*) that are expected to be achieved by the participant in focus (*I*) at the end of CL scenario. The *behavioral role* as part of the CL roles “*I-role*” and “*You-role*” is used to describe the behaviors externalized by the participants “*I*” and “*You*” when they interact in the CL scenario employing the learning strategy (*$Y \leq I\text{-goal}$*).

Figure 3 – Ontological structure to represent CL scenarios



Source: Isotani (2009).

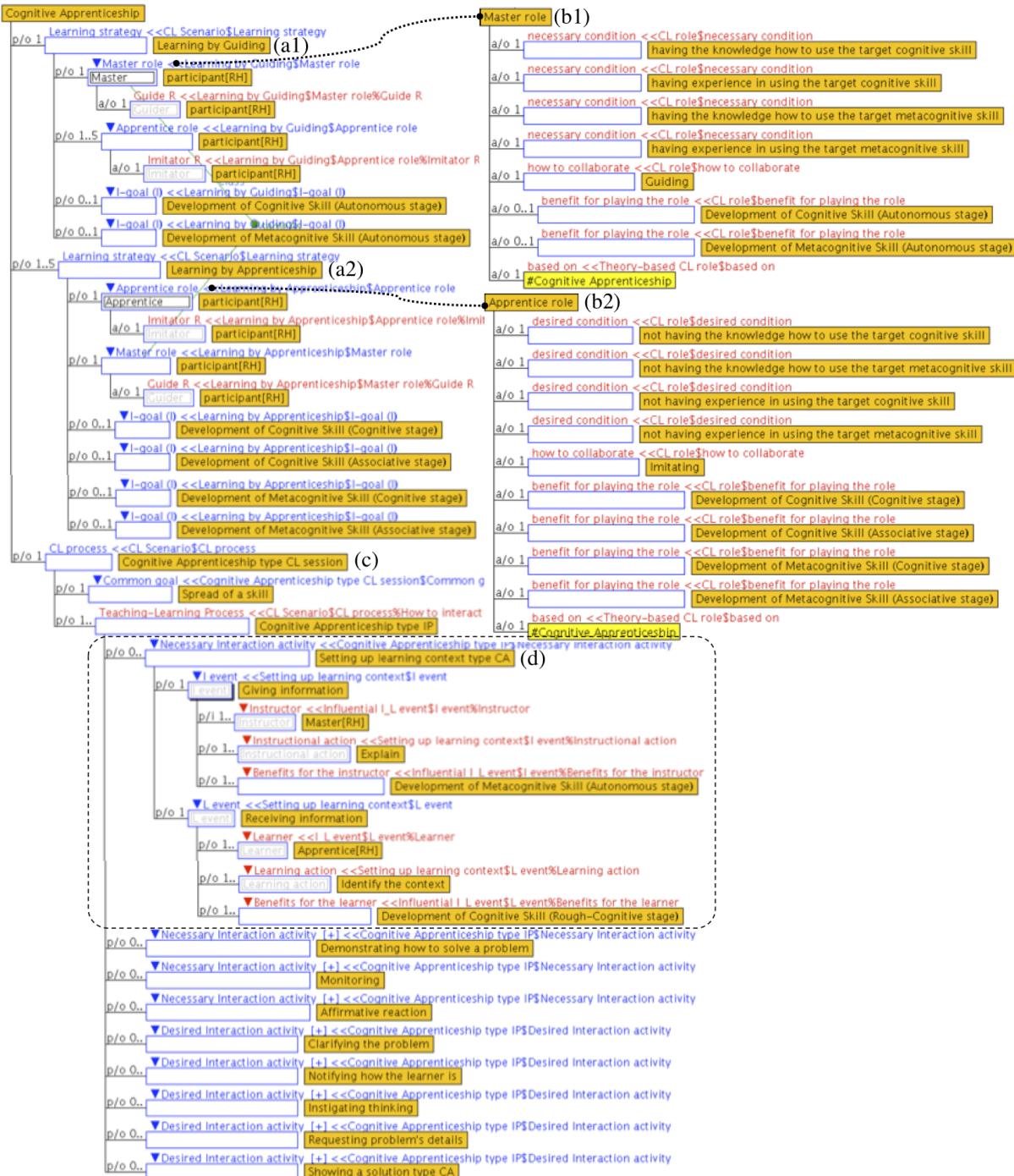
- (b) The **CL role** describes functions, goals, duties and responsibilities that must be taken by members of group to achieve the common and individual learning goals. Thus, the ontological structure to represent a CL role is composed by: the *necessary condition* and *desired conditions* to play the CL role, the description of *how to collaborate* when a group member plays the CL role, and the description of *benefits for playing the role*. In this ontological structure, *Cognitive/Knowledges states* are used to define the necessary and desired conditions for a group member to play the CL role, *behaviors* are used to describe *how to collaborate* playing the CL role, and individual learning goals (*I-goal*) are employed to describe the expected *benefits for playing the role*.
- (c) The **CL process** is the *rational arrangement of group activity* (*W(A)-goal*) whereby the common and individual learning goals are achieved by the group members. This arrangement is represented by the *common learning goals* (*W(L)-goal*) as result of the negotiation process in the group formation, and by the *Interaction Pattern* as the sequencing mechanism followed by the participants to achieve their individual learning goals (*I-goal*). The interaction pattern is represented as a set of *necessary* and *desired interactions* in which the interaction for the group members is described as influential Instructional-Learning events (*Influential I_L events*).
- (d) The **Influential I_L event** represents the interaction among the group members and the benefits obtained by the interaction from two viewpoints: from the viewpoint of participants who play a role of instructor, and from the viewpoint of participants who

play a role of learner. The influential I_L event describes group members performing actions that influence other members with the purpose to change their own learning states by helping others to achieve their individual learning goals. Therefore, the ontological structure to represent an influential I_L event is composed by two events: a *learning event* and an *instructional event* in which the participants are represented as actors of CL scenario playing CL roles and performing a set of actions to achieve their individual learning goals (*I-goal*). For a group member acting as *instructor*, the influential I_L event describes his/her interaction with other group member who acts as *learner* by means of instructional actions, and the expected *benefits for the instructor* (*I-goal*). For a group member acting as *learner*, the influential I_L event describes his/her interaction with other group member who acts as *instructor* by means of learning actions, and the expected *benefits for the learner* (*I-goal*).

As it was said before, the ontological structures shown in [Figure 3](#) are used to describe CL scenarios that compliant with instructional and learning theories. To illustrate this, [Figure 4](#) shows the representation of a CL scenario based on the Cognitive Apprentice theory. According to this theory, the CL activities should incorporate situations that are familiar to those who are using these activities, and these situations must lead the participants to act and interact acquiring skills in a specific context, and then generalizing these skills to other situations. Therefore, the CL scenarios based on the Cognitive Apprentice theory focuses on supporting a more skilled participant (known as *master*) to teach a familiar situation for the lesser skilled participants (known as *apprentices*) who learn by observing the skilled participant's behaviors and mimic him/her in other similar situations. From the viewpoint of the more skilled participant, he/she is supported by the learning strategy “*learning by guiding*” (a1), his/her role (*I-role*) is the *Master role* with a behavioral role of *Guider*, and his/her individual learning goals are the *development of cognitive or meta-cognitive skills* at the levels of *Autonomous stage*. From the viewpoint of a lesser skilled participant, he/she is supported by the learning strategy “*learning strategy by guiding*” (a2) to interact with the master, his/her role (*I-role*) is the *Apprentice role* with the behavioral role of *Imitator*, and his/her individual goals are the *development of cognitive and/or meta-cognitive skills* at the levels of *Cognitive stage* and *Associative stage*.

According to the cognitive apprentice theory, the more skilled participant who plays the master role must have knowledge and/or experience in using the target cognitive or metacognitive skill. Therefore, the necessary conditions to play the *Master role* as shown in [Figure 4](#) (b1) are: *having the knowledge how to use the target cognitive skill*, *having experience in using the target cognitive skill*, and *having experience in using the target metacognitive skill*. When a participant adequately plays the master role, he/she acts *Guiding* others participants, and as consequence of this behavior, he/she is benefited with the *Development of cognitive or metacognitive skill* at the *Autonomous stage*. The cognitive apprenticeship theory indicates that the participants without any knowledge or experience in how to use the target skill should play the apprentice

Figure 4 – Ontological structures to represent a CL scenario based on the cognitive apprenticeship theory

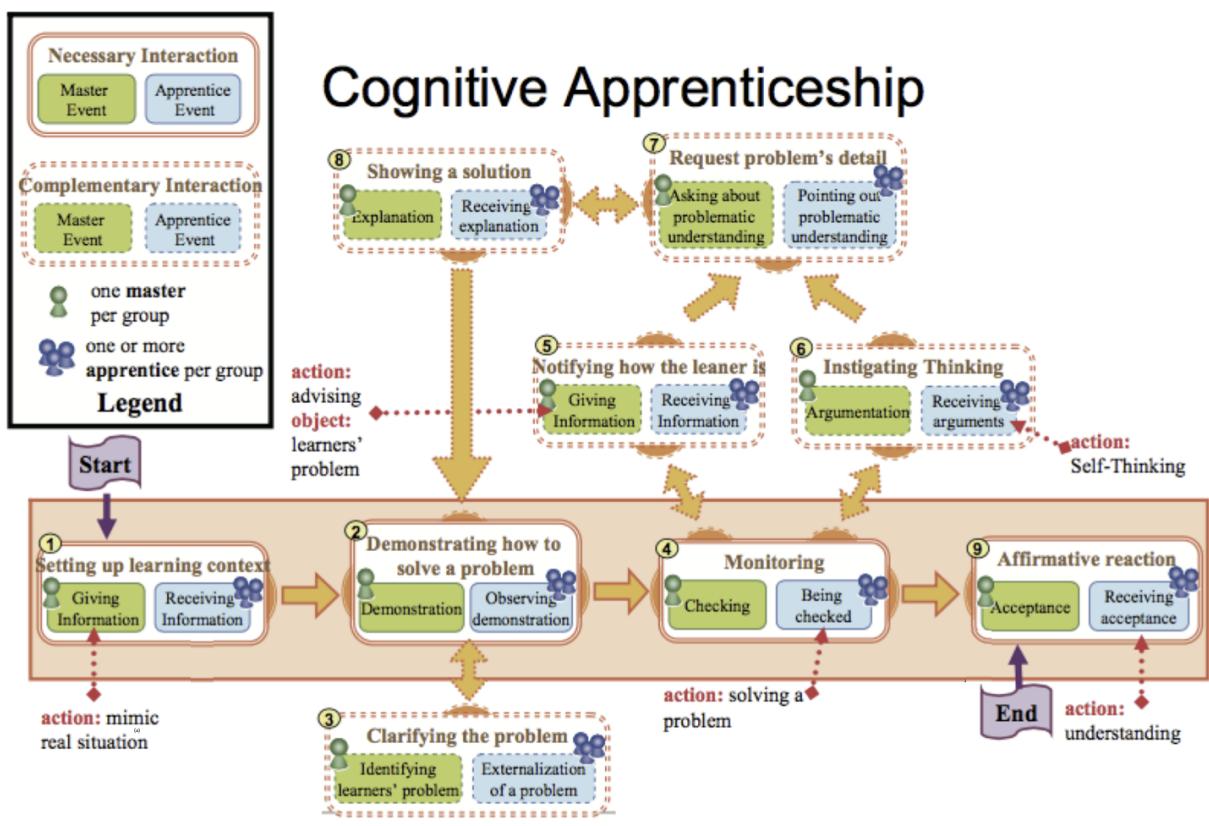


Source: Elaborated by the author.

role. Therefore, there is not necessary conditions in the ontological structure shown in Figure 4 (b2) to represent the *Apprentice role*, and the desired conditions for this role are: *not having the knowledge how to use target metacognitive or cognitive skill* and *not having experience in using the target metacognitive or cognitive skill*. When a participant adequately play the *Apprentice role*, he/she acts *Imitating* the behavior of the master and obtaining the benefits in the *Development of metacognitive or cognitive skill* at the levels of *Cognitive* and *Associative* stages.

When the two learning strategies, *Learning by Guiding* and *Learning by Apprenticeship*, are simultaneously employed to structure the interactions among the participants in the CL scenario, a positive synergy is created among them producing a *Spread of skills*. This arrangement is formalized by the ontological structure shown in Figure 4 (c), where the *CL process* is defined as a *Cognitive Apprenticeship type CL session*, the *Common goal* of this session is the *Spread of skill*, and the *Teaching-Learning Process* is an *Interaction Pattern* defined by the sequencing mechanism of a CSCL script inspired by the Cognitive Apprenticeship theory. This sequencing mechanism defines the necessary and complementary interactions shown in Figure 5.

Figure 5 – Necessary and complementary interactions defined by the sequencing mechanism of a CSCL script inspired by the cognitive apprenticeship theory



Source: Adapted from Isotani (2009).

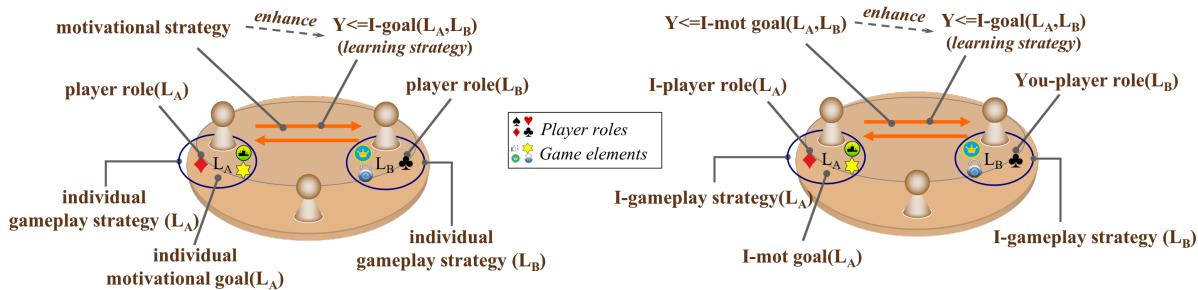
The necessary and desired interactions defined by the sequencing mechanism shown in Figure 5 are formalized as *Influential I_L event* in the *Teaching-Learning Process* of *Cognitive Apprenticeship type CL session* shown in Figure 4 (c). The ontological structure to represent

the interaction “*Setting up learning context type CA*” is shown in detail in [Figure 4](#) (d). In this interaction, the instructional event “*Giving Information*” describes the action “*Explain*” as an instructional action performed by the participant who plays the *Master role* to *develop the metacognitive skill* at the level of *Autonomous stage*. The learning event “*Receiving information*” describes the action “*Identify the context*” as a learning action performed by the participant who plays the *Apprentice role* to *develop the cognitive skill* at the level of *Rough-Cognitive stage*.

3.2 Ontological Structures to Represent Gamified Collaborative Learning Scenarios

The concepts, terms and relations shown in [Figure 6](#) have been formalized in the ontology OntoGaCLeS to represent gamified CL scenarios. These elements employ an independent vocabulary from any theory and practice, and they are described as follows as:

Figure 6 – Concepts, terms and relations defined in the ontology to represent gamified CL scenarios



Source: Elaborated by the author.

Y<=I-mot goal is the *individual motivational strategy* used to enhance the learning strategy ($Y<=I\text{-goal}$) employed by the participant in focus (I).

I-mot goal is the *individual motivational goal* for the participant in focus (I), and it represents what is expected to happen in his/her motivational stage when an individual motivational strategy ($Y<=I\text{-mot goal}$) is applied in the CL scenario to enhance the learning strategy ($Y<=I\text{-goal}$) employed by him/her to interact with other member of group (You).

I-player role is the *player role* for the participant in focus (I).

You-player role is the *player role* for the participant (You) who interacts with the participant in focus (I).

I-gameplay is the *individual gameplay strategy* for the participant in focus (I), and it describes the implementation of the individual motivational strategy ($Y<=I\text{-mot goal}$) when this strategy corresponds to the gamification.

In the following subsections, the formalization of concepts, terms and relations briefly introduced here are detailed.

3.2.1 Individual Motivational Goal (*I-mot goal*)

The *individual motivational goal (I-mot goal)* has been formalized in the ontology OntoGaCLeS to represent the reason why is necessary to apply an individual motivational strategy in a CL scenario. Thus, for the participant in focus (*I*), the individual motivational goal (*I-mot goal*) represents what is expected to happen in his/her motivational stage when a motivational strategy is applied in the CL scenario to enhance the learning strategy employed by him/her to interact with others. In this sense, the individual motivational goal describes the motivational stages that must be reached by a person to be motivated to interact with other.

[Figure 7](#) shows the ontological structure that has been formalized in the ontology OntoGaCLeS to represent an individual motivational goal (*I-mot goal*), where: the *initial stage* and *goal stage* are stages used to represent the expected change in the motivational stage of the person in focus (*I*).

Figure 7 – Ontological structures to represent individual motivational goal (*I-mot goal*). At the bottom, the “*Satisfaction of psychological need*” (left) and the “*Internalization of motivation*” (right)



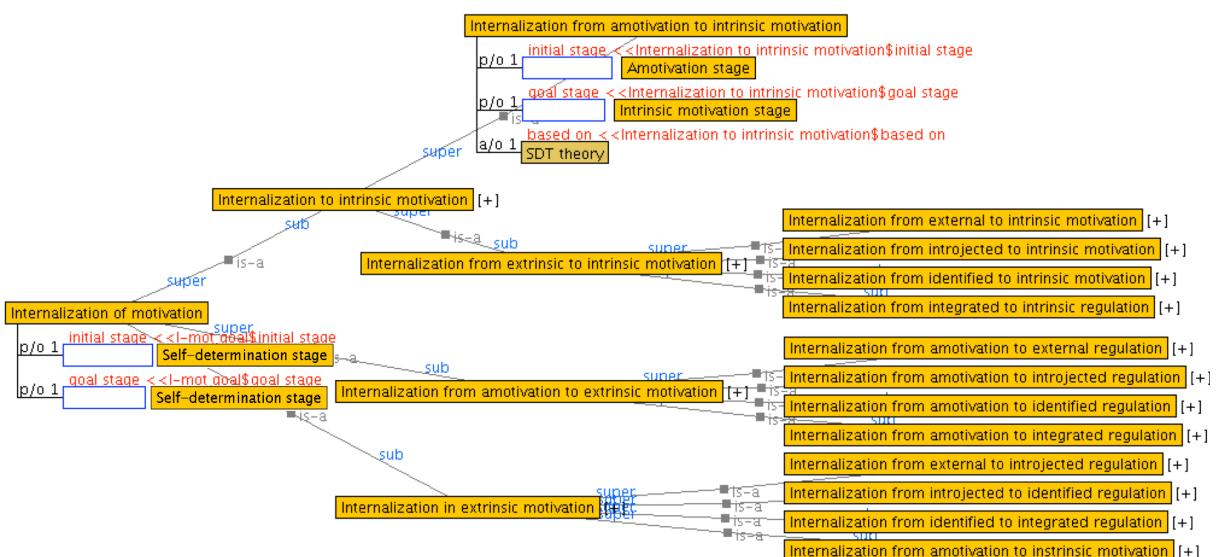
Source: Elaborated by the author.

Two types of individual motivational goals have been currently formalized in the ontology OntoGaCLeS to describe the individual motivational goals (*I-mot goal*) related to gamification as individual motivational strategy. The former, known as *Satisfaction of psychological needs*, has been formalized based on the conceptualization of motivation as internal psychological process to satisfy human needs (PITCHARD; ASHWOOD, 2008); and the latter, known as *Internalization of motivation*, has been formalized based on the form in which an individual regulates his/her own choices to behave and act (DECI; RYAN, 2010). [Figure 7](#) shows the representation for these two types of individual motivational goals. The initial and goal stages related to the *Internalization of motivation* are defined by the self-determination stage, whereas the initial and goal stages for the *Satisfaction of psychological need* are defined by the *psychological need stages*. In the articles

(CHALLCO *et al.*, 2015; CHALLCO *et al.*, 2014; CHALLCO *et al.*, 2014), the author of this thesis used the concept of “*Phychological need*” to refer the concept of “*Psychological need stage*,” and the concept of “*Without need*” to refer the stages described as “\$1 need satisfied” where \$1 is substitute by psychological needs (e.g. *Mastery need satisfied*).

As it was mentioned before, in the Chapter 2, motivation is an internal psychological process associated with three general components of arousal, direction and intensity in which the arousal component is caused by needs (also called *wants* or *desires*). These needs cause that a person behaves and acts to satisfy needs (MITCHELL; DANIELS, 2003). Consequently, motivation is a constructor that describes why a person chooses to allocate time and energy for different behaviors and actions to maximize the satisfaction of his/her own needs (PRITCHARD; ASHWOOD, 2008). It means that, in a CL scenario, the motivation problem caused by the scripted collaboration occurs when the participant believes that this scenario will not lead him/her to satisfy his/her individual needs. Therefore, the motivational strategy is applied in the CL scenario to change this perception. Based on this assumption, the individual motivational goals (*I-mot goal*) for the person in focus (*I*) has been formalized in the ontology OntoGaCLeS as the satisfaction of needs. More specifically, in gamified CL scenarios, the individual motivational goal is described as *Satisfaction of psychological needs* because game elements do not satisfy all human needs, they only satisfy part of these needs that are referred by the author of this thesis as *psychological needs*. The psychological needs are the human needs that are classified in the groups of relatedness and growth needs according to the ERG (Existence, Relatedness and Growth) theory (ALDERFER, 1972).

Figure 8 – Ontological structures to represent “*Satisfaction of psychological need*.” At the top right, the ontological structure to represent “*Satisfaction of autonomy*.”

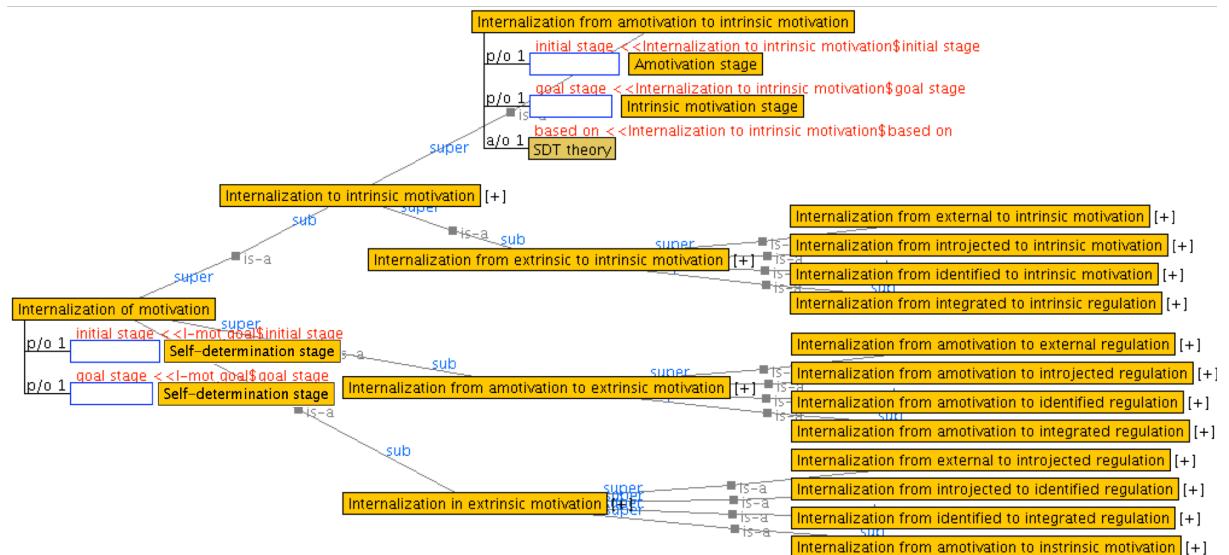


Source: Elaborated by the author.

Figure 8 shows the ontological structures formalized to represent the *Satisfaction of*

psychological need. These ontological structures represent the satisfaction of innate psychological needs, and they comprise what is intended to evoke in minds of users by the majority of experts when non-game contexts are gamified (MORA *et al.*, 2015; SEABORN; FELS, 2015). According to the SDT theory (RYAN; DECI, 2000; DECI; RYAN, 2010), the well-being of an individual is reached when the psychological needs of autonomy, competence and relatedness are satisfied (DECI; RYAN, 1985; DECI; RYAN, 2010), and according to the Dan Pink's theory (PINK, 2011), a person is motivate and engage in a cognitive, decision-making, creative or higher-order thinking task when it is given with autonomy, mastery and purpose. At the top right of Figure 8, the ontological structure to represent the *Satisfaction of autonomy* is detailed in which, based on a unipolar scale from unsatisfied need to satisfied need, the roles for the initial and goal stages are played by the *Autonomy unsatisfied* and the *Autonomy satisfied*, respectively. Employing the same unipolar scale, and the need-theories of motivation, SDT theory (DECI; RYAN, 2010) and Dan Pink motivation theory (PINK, 2011), a set of individual motivational goals as satisfactions of psychological needs have been formalized in the ontology OntoGaCLeS, and they are detailed in section A.2.

Figure 9 – Ontological structures to represent “Internalization of motivation.” At the top right, the ontological structure to represent the “Internalization from amotivation to intrinsic motivation.”



Source: Elaborated by the author.

The *internalization of motivation* is the process by which “*values, attitudes or regulatory structures, such that the external regulation of a behavior is transformed into an internal regulation, so no longer requires the presence of an external contingency*” (GAGNÉ; DECI, 2005). In this sense, the internalization of motivation in relation to the satisfaction of needs refers to changes in the motivation from a non-free choice to a free choice of needs that are satisfied by oneself. According to the SDT theory (DECI; RYAN, 1985; RYAN; DECI, 2000), this change happens from the extrinsic motivation to intrinsic motivation when motivation is changed from a non-self-determined form (*non-freely choice*) to a self-determined form (*freely choice by*

(oneself). Here, the extrinsic motivators employed by the game elements must be configured as an attempt to transform the current motivation stages of participants from amotivation and extrinsic motivation into intrinsic motivation. Based on these definitions, the ontological structures shown in Figure 9 have been formalized in the ontology OntoGaCLeS to represent the *Internalization of motivation*. These ontological structures have been formalized employing the continuum ranging of stages from *amotivation* (not internalized behave) into *external motivation* (not at all internalized behave) to *introjected motivation* (partially internalized behave) to *identified motivation* (fully internalized behave) to *intrinsic motivation* (automatically internalized behave). At the top right of Figure 9 is detailed the formalization for the change from *Amotivation stage (initial stage)* to *Intrinsic motivation stage (goal stage)* defined as “*Internalization from amotivation to intrinsic motivation.*” The detailing of all ontological structures to represent the internalization of motivation is presented in section A.2.

3.2.2 Player Role

The identification of homogeneous people groups that differ from other groups in a significant way is essential to define the personalization in any system. In game design, this segmentation is established by player types models in which typologies are used to categorize the users in different groups according to their geographic location (Ben Judd *et al.*, 2016; CHAKRABORTY *et al.*, 2015), their demographic situation (GREENBERG *et al.*, 2010; SHAW, 2012), their psychographic characteristics (TSENG, 2011; YEE, 2006), and their behavioral characteristics (BARTLE, 2004; LAZZARO, 2009). These player type models aim to help the game designers to identify the necessary features that make a game fun, enjoyable and desirable for a particular audience.

The player type models cannot be directly extrapolated to others context for which they are not intended. Thus, the concept of *Player role* has been formalized by the author of this thesis in the ontology OntoGaCLeS to define typologies of player types in the context of CL scenarios. Player roles describe the functionality, responsibilities and requirements whereby a group of participants becomes players in a gamified CL scenario. This segmentation is based on individual characteristics of participants that establish a segmentation of participants using necessary and desired conditions. In this sense, the *Player role* has been formalized by the ontological structure shown in Figure 10. This structure defines the conditions that must be satisfied by a participant in the CL scenario to play the player role as: *necessary condition* and *desired condition*. Thus, a participant of CL scenario cannot play a player role when he/she does not fulfill the necessary conditions, and when the participant fulfills the necessary and desired conditions has more probability to obtain the expected *benefits for playing the role*.

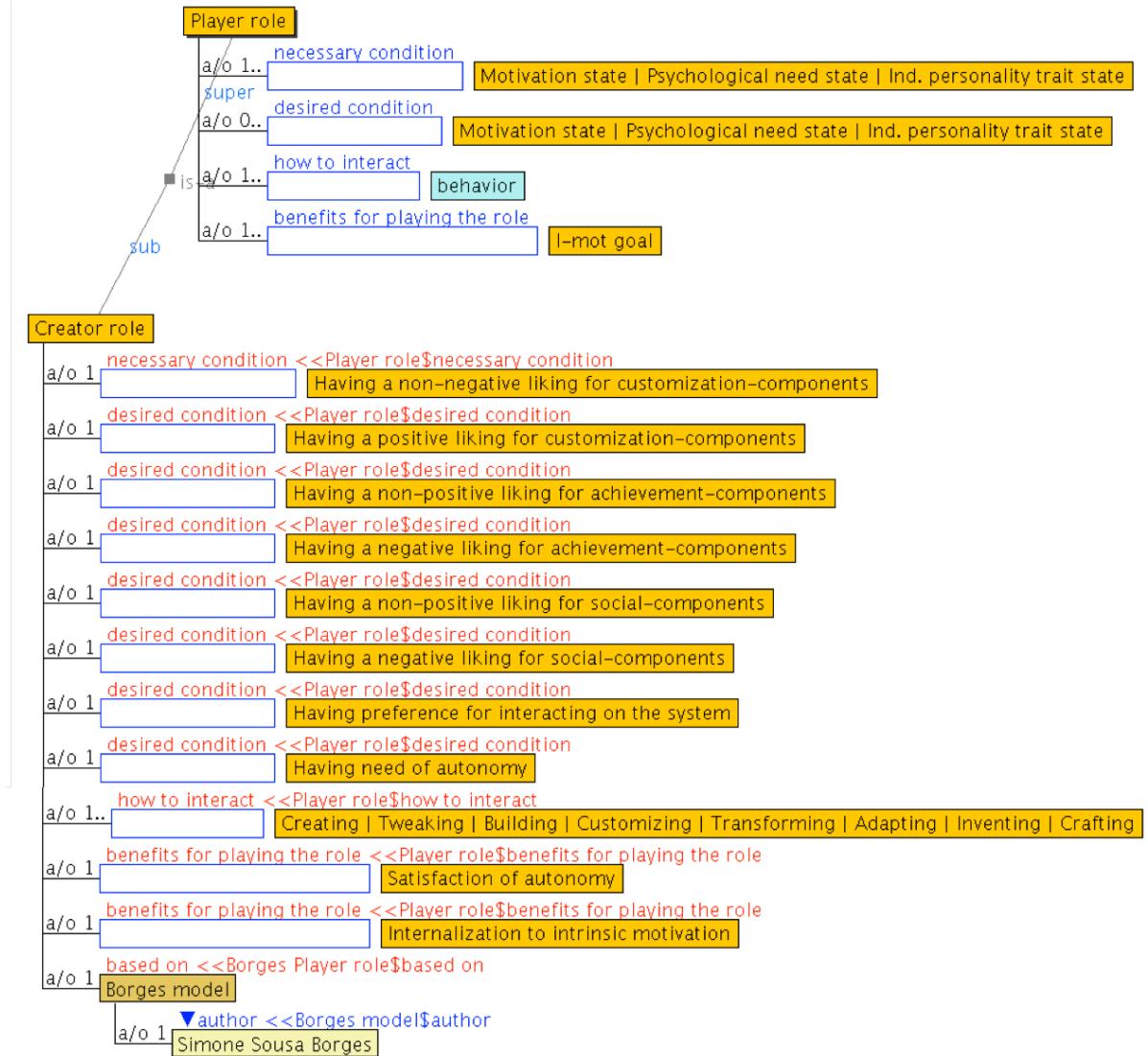
The necessary and desire conditions in the ontological structure to represent *Player role* are defined by: motivation states, psychological need states, and individual personality trait states. A tree overview for these states are detailed in section A.1, where:

- The *motivation state* is an internal state that describes the temporal attitudinal state of a person in relation to his/her desire to be a participant in the CL session. These stages can be *Not motivated* and *Motivated*. The state of motivated is also divided in two types: “*Intrinsic motivated*” and “*Extrinsic motivated*” (DECI; RYAN, 2010). It is important to notice here that the concept of motivation state is not the same as the concept of motivation stage. Although both concepts represent changes in relation to the motivation of participants, the motivation state represents a specific point in the whole process of being motivated, whereas the motivation stage represents an interval in the motivation process.
- The *psychological need state* represents the current psychological need of a person in which the states for each one of the psychological needs are formalized through the representation of pair states: “*Having need of \$I*” and “*Not having need of \$I*” in which “\$I” is replaced by the name of the need that is being described as prerequisite. For instance, to represent the states related to the psychological need of competence, the states of “*Having need of competence*” and “*Not having need of competence*” have been formalized as psychological need state in the ontology OntoGaCLeS.
- The *individual personality trait state* describes states related to individual personality traits, such as introversion, extraversion, openness to experience, and conscientiousness. The individual personality trait states describe the characteristic that make a person unique by indicating his/her habitual patterns of thought, emotion and behavior for different situations (MATTHEWS; DEARY; WHITEMAN, 2003). These states express whether a participant either has or does not have the individual personality trait. In the ontology OntoGaCLeS, there are represented individual personality traits states related to: the big five personality traits (COSTA; MACCRAE, 1992), the MBTI personality traits (BRIGGS, 1976), the game-playing style preferences described in the Bartle’s player type model (BARTLE, 2004), and the game-playing liking preferences described in the Yee’s motivation components (YEE, 2006).

Beside to describe the necessary and desired conditions that should be satisfied by an individual, the ontological structure to represent *Player role* shown in Figure 10 describe the information about: how the participant with the player role is expected to interact with the game elements (*how to interact*), and the expected benefits for playing the player role (*benefits for playing the role*). Thus, concepts described as *behavior* are used to represent the possible manners in which a participant should interact to other, and concepts described as individual motivational goals (*I-mot goal*) are used to represent the expected *benefits for playing the role*.

At the bottom of Figure 10, the *Creator role* is shown as example of the formalization of a player role using the ontological structure proposed in this section. According to this structure, participants who have a greater liking for customization-components rather than for other game components are classified as creators. This segmentation is represented by the necessary

Figure 10 – Ontological structure to represent “*Player role*” (At the top). At the bottom, the ontological structure to represent the player role “*Dreamer role*.”



Source: Elaborated by the author.

condition of “*having a non-negative liking for customization-components*,” and the desired conditions of “*having a positive liking for customization-components*,” “*having a non-positive liking for achievement-component*,” “*having a negative liking for achievement-component*,” “*having a non-positive liking for social-component*,” and “*having a negative liking for social-component*.” The desired conditions related to the behavioral characteristics of participants to act as a player role are: “*having preference for interacting on the system*” and “*having need of autonomy*.” The expected behaviors to obtain benefits for playing the creator role are: “*Creating*,” “*Tweaking*,” “*Building*,” “*Customizing*,” “*Transforming*,” “*Adapting*,” “*Inventing*” or “*Crafting*.” As consequence to behave as creator, the participants attain the *Satisfaction of autonomy* and the *Internalization to intrinsic motivation (I-mot goal)*.

In the ontology OntoGaCLEs, based on the information extracted from five different

player type models, twenty-six players roles have been formalized and represented using the ontological structure proposed in this section. These player roles, their conditions, expected behaviors and benefits for the person who plays the role are detailed in [section A.3](#).

3.2.3 Individual Motivational Strategy ($Y \leq I\text{-mot goal}$)

In the context of CL scenarios, an *individual motivational strategy* is defined by the author of this thesis as a set of guidelines defined to motivate a participant to interact with other group members using learning strategies. These guidelines are independent of any technology, so that the individual motivational strategy basically describes what motivates a participant to act and behave in certain way. For example, consider the following guidelines extracted from the Model-driven Persuasive Game in which:

“... cooperation is only a significant motivator of behaviour change for achievers and socializers... This is in line with the gaming style of socializers, who enjoy helping others. Achievers would also prefer to cooperate because they are inherently more altruistic ... achievers do often co-operate with one another, usually to perform some difficult collective goal, and from these shared experiences can grow deep, enduring friendships which may surpass in intensity those commonly found among individuals other groups.” [Orji \(2014\)](#).

When these two guidelines are applied in a CL scenario by providing a situation in which the participants must cooperate to achieve a group goal (e.g. obtain a especial reward based on the collective performance of group members), these guidelines becomes a individual motivational strategy that could be applied to motivate participant who fall in the category of socializer or achiever because they are motivated by the desired to accomplish the group goal and the desired to help others, respectively.

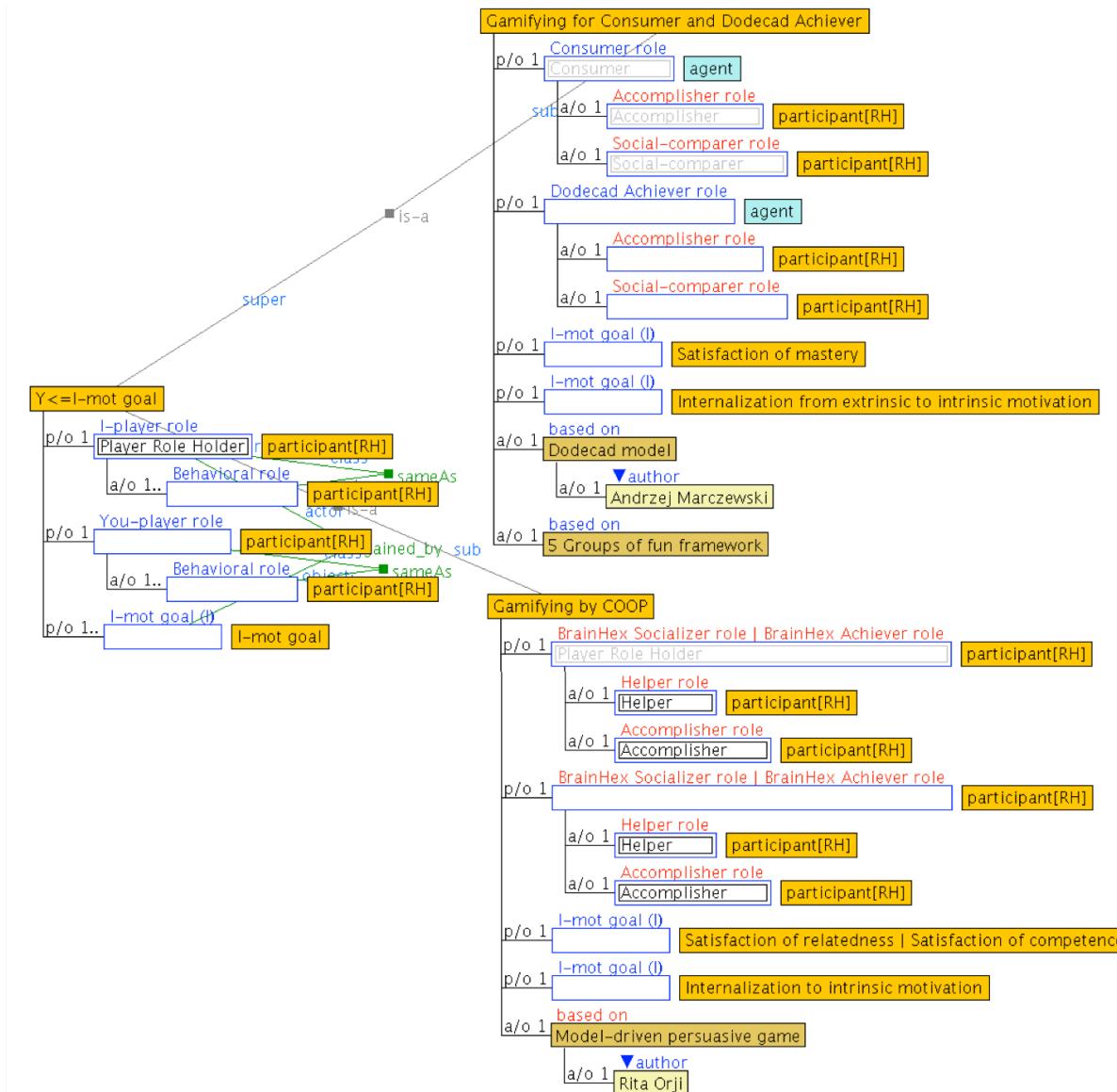
The ontological structure shown in [Figure 11](#) has been proposed by the author of this PhD thesis dissertation to represent the formalization of individual motivational strategies whose guidelines are extracted from gamification models or game design models. According to this structure, an *individual motivational strategy* ($Y \leq I\text{-mot goal}$) is described by:

I-player role to indicate the player role for the participant in focus (I) who becomes a *player role holder* when he/she is motivated by the motivational strategy. This player role also indicates the *behavioral roles* whereby the participant in focus (I) is motivated to interact with other participant (You) employing the learning strategy ($Y \leq I\text{-goal}$).

You-player role to indicate the player role for the participant (You) who interacts with the participant in focus (I). The *behavioral roles* whereby the *player role holder* of this role supports the interaction of participant in focus (I) are also indicated in this structure.

I-mot goal (I) to indicate the individual motivational goals (*I-mot goal (I)*) whereby the participant in focus (*I*) is motivated to interact with other participant (*You*) employing a learning strategy (*Y<=I-goal*). In this sense, these individual motivational goals represent the reasons why the guidelines contained in the motivational strategy are applied in the CL scenario to enhance the learning strategy (*Y<=I-goal*) employed by the participant in focus (*I*) to interact with other participant (*You*).

Figure 11 – Ontological structure to represent “*Individual motivational strategy*” (at the left). At the right, the motivational strategies “*Gamifying for Consumer and Dodecad Achiever*” (right-top) and “*Gamifying by COOP*” (right-bottom).



Source: Elaborated by the author.

To exemplify the formalization of the individual motivational strategies using the ontological structure proposed in this section, Figure 11 also shows two examples in which the attribute “*based on*” indicates the gamification models in which these motivational strategies are based.

The individual motivational strategy shown at the top-right of [Figure 11](#) is known as “*Gamifying for Consumer and Dodecad Achiever*,” and it has been formalized based on guidelines of the Dodecad model ([MARCZEWSKI, 2015a](#)) and 5 Groups of fun framework ([MARCZEWSKI, 2015b](#)). According to these guidelines, the consumers and achievers are motivated by the need to obtain a reward that demonstrates for other participants their accomplishments. Hence, the *Accomplisher* and *Social-comparer* are *behavioral roles* whereby a participant in focus (*I*) playing the *Consumer role* is motivated to interact with the participant (*You*) who plays the *Achieve role*. Playing this role, the *Satisfaction of mastery* and the *Internalization from extrinsic to intrinsic motivation* are individual motivational goals whereby the participant in focus (*I*) as consumer is motivated to interact with other participant (*You*) who acts as achiever. Behaving as accomplisher and social-comparer, the participant in focus (*I*) has two individual motivational goals that are: to demonstrate his/her mastery represented as “*Satisfaction of mastery*;” and to internalize his/her current extrinsic motivation stage into intrinsic motivation stage represented as “*Internalization from extrinsic to intrinsic motivation*.”

At the bottom-right of [Figure 11](#), it is shown the ontological structure formalized to represent the application of the guidelines described in the Model-driven persuasive game for the cooperation strategy ([ORJI; VASSILEVA; MANDRYK, 2014](#)). These guidelines indicate cooperation as significant motivator for a participant who plays the socializer or achiever role because a participant who plays these roles enjoys to help others and cooperate with others in order to accomplish a difficult collective goal. Based on this, the motivational strategy of “*Gamifying by COOP*” defines the *BrainHex Socializer role* and *Brainhex Achiever role* as player roles that would be played by the participant in focus (*I*) and the participant (*You*) who gives support to the participant in focus. Playing these roles, the participants (*I* and *You*) act as *Helper* and *Accomplisher*. When the participant in focus (*I*) has the desire to accomplish the difficult collective goal, his/her individual motivational goal is the *Satisfaction of competence*, and when the participant in focus (*I*) has the desire to help others, his individual motivational goal is the *Satisfaction of relatedness*. The ontological structure also describes that as consequence of the application of the motivational strategy, it is expected changes in the motivational state for the participant in focus (*I*) from the amotivation or extrinsic motivated state to the intrinsic motivated state (*Internalization to intrinsic motivation*).

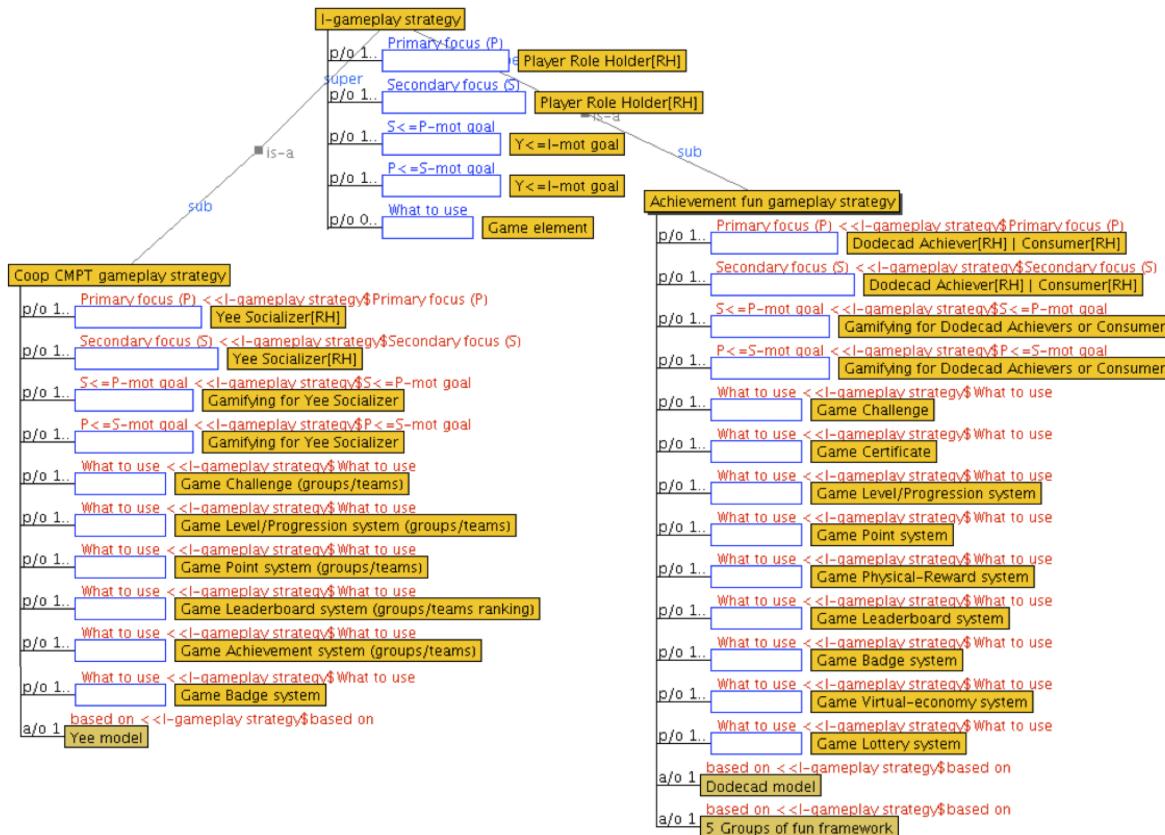
The individual motivational strategies based on gamification models currently defined in the ontology OntoGaCLeS, their player roles, their behavioral roles, and their individual motivational goals are detailed in [section A.4](#).

3.2.4 Individual Gameplay Strategy (*I-gameplay strategy*)

The guidelines extracted from the literature of gamification, game design and serious games are implemented through the design of way in which the users will experience their interactions with the game-like system ([FABRICATORE; LÓPEZ, 2014](#); [NACKE; DRACHEN;](#)

G"OBEL, 2010; SCHELL, 2008). Such design in gamification is frequently called as gameful design (DETERDING *et al.*, 2011; DICHEV *et al.*, 2014), and it has been formalized by the author of this thesis under the concept of *individual gameplay strategy* (*I-gameplay strategy*). In this sense, the gameplay of a gamified CL scenario is defined by the way in which the interactions between the participants and the game elements could occur. When a participant interacts with the game elements, the rules defined in the gamified CL scenario process his/her inputs causing changes in the game elements, and these modifications are communicated to the participant. These rules and changes are related to individual motivational goals that must be achieved by the participants, so that each participant has his/her own strategy to interact with the gamified CL scenario to achieve these goals. This strategy of interaction is the individual gameplay strategy, and it has been formalized by the ontological structure shown in Figure 12.

Figure 12 – Ontological structure to represent “*Individual gameplay strategy*” (at the top). At the bottom, the “*Coop. CMPT gameplay strategy*” (bottom-left), and the “*Achievement fun gameplay strategy*” (bottom-right)



Source: Elaborated by the author.

The individual gameplay strategy depends of the player roles assigned for the participants of CL scenario, the motivational strategies employed to gamify the CL scenario, and the game elements introduced in the CL scenario. Thus, the ontological structure to represent an individual gameplay strategy is defined as a rational arrangement of these elements, where:

Primary focus (P) indicates the *Player role holders* who are in the primary focus (P) of individual gameplay strategy. These player role holders are the participants who use the individual gameplay strategy (*I-gameplay strategy*) to interact with the game elements indicated in the attribute “*What to use*.”

Secondary focus (S) indicates the *Player role holders* who are in the secondary focus (S) of individual gameplay strategy. These player role holders are the participants who provide support for the player role holders in the primary focus (P) through the game elements indicated in the attribute “*What to use*.” It means that the individual gameplay strategy (*I-gameplay strategy*) is not necessarily used by the participants in secondary focus (S) to interact with the game elements, but their interactions in the gamified CL scenario produce changes in the state of game elements indicated in the attribute “*What to use*.”

S<=I-mot goal indicates the motivational strategies employed in the gamified CL scenario to motivate the player role holders who are in the primary focus (P).

P<=S-mot goal indicates the motivational strategies employed in the gamified CL scenario to motivate and engage the player role holders who are in the secondary focus (S).

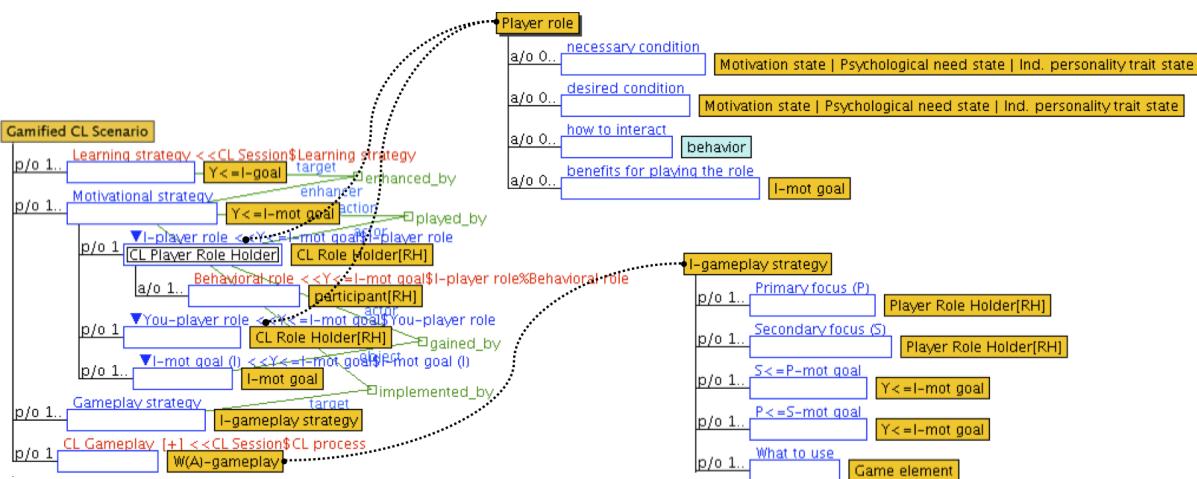
What to use indicates the game elements that are needed to carry out the individual gameplay strategy. Thus, the game elements defined in this attribute are the ones that are used to process the interactions of participants who are in the primary focus (P).

Currently, in the literature of gamification and game design, there is no one set of gameplay strategies established that could be directly formalized as individual gameplay strategies employing the ontological structure (*I-gameplay strategy*) proposed here. Therefore, the author of this thesis has inferred some individual gameplay strategies employing the guidelines of gamification and game design models. [Figure 12](#) shows two examples of this formalization in which the guidelines described in the Yee’s model ([YEE, 2006](#)) have been used to formalize the cooperative competition gameplay strategy (*Coop. CMPT gameplay strategy*) shown at the bottom-left of figure. According to this structure, a cooperative competition gameplay strategy is beneficial for participants who are holders of Yee’s Socializer role, Primary focus (P), when the motivational strategy “*Gamifying for Yee Socializer*” is applied in a CL scenario to motivate these group of participants to interact with other participants who are also holders of Yee’s Socializer role, Secondary focus (S). In the attribute “*What to use*,” this structure also indicates that game challenges for groups/teams, game level/progression systems for groups/teams, game point system for groups/teams, game leaderboard system with groups/teams rankings, game achievement system for groups/teams, and game badge systems are necessary to implement the cooperative competition gameplay strategy.

3.2.5 Gamified CL Scenario

A gamified CL scenario is a CL scenario in which the concepts previously presented in this section have been properly applied to gamify it. In this sense, to formally represent a gamified CL scenario in the ontology OntoGaCLeS, the ontological structures proposed in the CL ontology to represent a CL scenario (Figure 3) has been extended by adding the representation of motivational strategies ($Y \leq I\text{-mot goal}$) and gameplay strategies ($I\text{-gameplay strategy}$) at the same level that the learning strategies ($Y \leq I\text{-goal}$). The proper connection of these elements represents a “Gamified CL Scenario” by the ontological structures shown in Figure 13.

Figure 13 – Ontological structures to represent a “Gamified CL Scenario”



Source: Elaborated by the author.

As was explained in previous subsections, the individual motivational strategy ($Y \leq I\text{-mot goal}$) describes the guidelines used to enhance the learning strategy employed by the participant in focus (I), and the individual gameplay strategy ($I\text{-gameplay strategy}$) describes the strategy used to implement the guidelines of individual motivational strategies. Based on these definitions, in the ontological structures to represent a gamified CL scenario (Figure 13), the connection of these elements has been represented by the two relational-concepts: “*enhanced_by*” and “*implemented_by*.” The relational-concept “*enhanced_by*” indicates what individual motivational strategy ($Y \leq I\text{-mot goal}$) is used to enhance a learning strategy ($Y \leq I\text{-goal}$), and the relational-concept “*implemented_by*” indicates what individual gameplay strategy ($I\text{-gameplay strategy}$) is used to implement the guidelines of an individual motivational strategy ($Y \leq I\text{-mot goal}$).

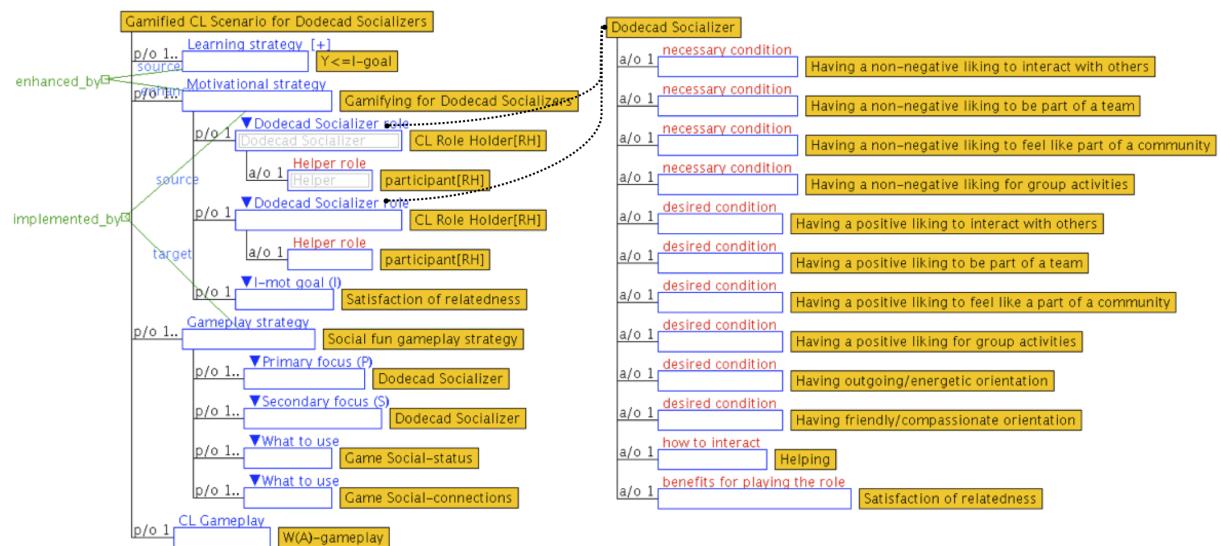
To illustrate the use of the ontological structures proposed in Figure 13, a gamified CL scenario for participant who plays the Dodecad Socializers has been formalized as shown in Figure 14, where the learning strategies ($Y \leq I\text{-goal}$) of participants are *enhanced* by the individual motivational strategy “*Gamifying for Dodecad Socializer*.” According to this motivational strategy:

“... Socializers are motivated by relatedness. They want to interact with

others and create social connections ... Socializers are the ones who want to interact with others. They like to be connected to others. They are interested in parts of the system that help them do this. These are the ones will evangelize your internal social networks. Most motivated by the social connections aspects of relatedness ... Socializer and Networkers will wish to interact with people. Neither will be after anything from people directly. In the case of a networker, their reward comes from being connected; whereas the socialiser's reward is knowing you and interacting with you ..." Marczewski (2015c).

Based on these guidelines, the individual motivational strategy “*Gamifying for Dodecad Socializer*” indicates that a participant who plays the Dodecad Socializer role (*I-player role*) interacts with other socializer (*You-player role*) acting as *Helper* to achieve the *Satisfaction of relatedness (I-mot goal)*. In this sense, the motivational strategy is *implemented by* a *Social fun gameplay strategy (I-gameplay strategy)* in which, to support the communication and cooperation of participants, the game social-status and game social-connections were inferred as necessary game elements to carry out the social fun gameplay strategy. This inference pertains to the author of this thesis, and it consists in that participants who play the socializer role are interesting into help others by looking for social connections and status to satisfy his/her need of relatedness.

Figure 14 – Ontological structures to represent a “*Gamified CL Scenario for Dodecad Socializers*”



Source: Elaborated by the author.

3.3 Formalizing an Ontological Model to Personalize the Gamification in Collaborative Learning Scenarios

Through the use of ontological structures presented in the previous section, the author of this thesis expects to facilitate the systematic formalization of gamified CL scenarios based

on concepts extracted from player types models and need-based theories of motivation. With this formalization, it is possible to build ontological models to personalize the gamification in CL scenario. These models consist in a set of gamified CL scenarios formally represented as the ontological structures proposed in Figure 13. The building of these structures to define an ontological model comprises the following steps: (1) to identify the player roles that can be assigned for the participants of CL scenario when they are playing a CL role, (2) to identify the restriction and elements of motivational strategies for each pair of identified player roles, and (3) to define individual gameplay strategies for the identified pairs of player roles.

In this section, following these steps, the building of an ontological model to personalize the gamification in CL scenario is detailed in this section. This model has been built to gamify CL scenarios based on the Peer-tutoring theory (ENDLSEY, 1980) in which the Dodecad player type model (MARCZEWSKI, 2017; MARCZEWSKI, 2015b) have been used as source of information to formalize this model.

Step (1): Identifying Player Roles for CL Scenarios

The identification of player roles to gamify a CL scenario is carried out by analyzing the expected behaviors to be externalized for these roles and the CL roles. Possible counterproductive behaviors indicate what player roles cannot be assigned to a participant when he/she plays the CL role. Table 1 shows the result of this step (1) for the CL roles of “*Peer-Tutor*” and “*Peer-Tutee*” defined in CL Scenarios based on the Peer-tutoring theory. Counterproductive behaviors of player roles are avoided to not interfere with the expected behaviors of CL roles. Thus, for example, participants who are playing the CL roles of Peer-tutor and Peer-tutee cannot play the *Griefer roles* because they want to negatively affect other users.

Table 1 – Dodecad player roles that can be assigned for participants of a Peer-tutoring scenario

	Peer-Tutor (explaining)	Peer-Tutee (passive learning)
Achiever (accomplishing, comparing)	Yes	Yes
Free-Spirit (creating, exploring)	No (don't want to be restricted)	No (don't want to be restricted)
Socializer (helping)	Yes	Yes
Philanthropist (giving, helping, sharing)	Yes	Yes
Consumer (accomplishing, comparing)	Yes	Yes
Exploiter (creating, exploring)	No (don't want to be restricted)	No (don't want to be restricted)

Table 1 – (continued)

	Peer-Tutor (explaining)	Peer-Tutee (passive learning)
Networker (helping)	Yes	Yes
Self-Seeker (giving, helping, sharing)	Yes	Yes
Destroyer (hacking)	No (hacking to ruin experience of others)	No (hacking to ruin experience of others)
Improver (hacking, exploring, fixing)	No (hacking to change the system)	No (hacking to change the system)
Influencer (commenting)	No (requiring changes in the system)	No (requiring changes in the system)
Griefer (troublemaking, defying)	No (negatively affect to others)	No (negatively affect to others)

Step (2): Identifying Restrictions and Elements of Motivational Strategies

To identify the restrictions and elements of individual motivational strategies ($Y \leq I$ -mot goal), guidelines for the pairs of player roles identified in the step (1) are crossed. These guidelines are extracted from the player type models for the building of ontological models to personalize the gamification in CL scenarios. When these guidelines related to a pair of player roles are crossed, counterproductive behaviors are avoided to not interfere with the expected benefits that can be achieved by the participants playing these roles and performing these behaviors. The expected benefits are expressed as individual motivational goals (I -mot goals) based on interpretation of these benefits using need-based theories of motivation.

Table 2 shows the result obtained in this step for the definition of individual motivational strategies in the ontological model to personalize the gamification in Peer-tutoring CL scenarios. The rows indicate the player roles (I -Player role) for the participant in focus (I), and the columns indicate the player roles (You -Player role) for the participant (You) who interacts with the participant in focus (I). The individual gameplay strategies and their elements are indicated in the crossed cells. These strategies were defined from common guidelines for each pair of player roles. Thus, an individual gameplay strategy has been formalized in the ontological model when there are common expected behaviors indicated in the guidelines of player roles “ I -Player role” and “ You -Player role.”

Table 2 – Individual motivational strategies identified for the building of an ontological model to personalize the gamification in Peer-tutoring scenarios

	Achiever <i>(accomplishing, comparing)</i>	Socializer <i>(helping)</i>	Philanthropist <i>(giving, helping, sharing)</i>	Consumer <i>(accomplishing, comparing)</i>	Networker <i>(helping)</i>	Self-seeker <i>(giving, helping, sharing)</i>
Achiever <i>(accomplishing, comparing)</i>	<i>Gamifying for Dodecad Achievers</i> • Satisfaction of mastery		<i>Gamifying for Dodecad Achievers and Consumer</i> • Satisfaction of mastery • Internalization from extrinsic to intrinsic motivation			
Socializer <i>(helping)</i>		<i>Gamifying for Dodecad Socializers</i> • Satisfaction of relatedness		<i>Gamifying for Dodecad Socializer and Networker</i> • Satisfaction of relatedness • Internalization from extrinsic to intrinsic motivation		<i>Gamifying for Philanthropist and Self-seeker</i> • Satisfaction of purpose • Internalization from extrinsic to intrinsic motivation
Philanthropist <i>(giving, helping, sharing)</i>			<i>Gamifying for Philanthropists</i> • Satisfaction of purpose		<i>Gamifying for Consumers</i> • Satisfaction of mastery	
Consumer <i>(accomplishing, comparing)</i>			<i>Gamifying for Consumer and Dodecad Achiever</i> • Satisfaction of mastery • Internalization from extrinsic to intrinsic motivation			

Table 2 – (continued)

	Achiever (accomplishing, comparing)	Socializer (helping)	Philanthropist (giving, helping, sharing)	Consumer (accomplishing, comparing)	Networker (helping)	Self-seeker (giving, helping, sharing)
Networker (helping)	<i>Gamifying for Networker and Dodecad Socializer</i> • Satisfaction of relatedness • Internalization from extrinsic to intrinsic motivation	<i>Gamifying for Networker and Dodecad Socializer</i> • Satisfaction of relatedness	<i>Gamifying for Networker</i> • Satisfaction of relatedness	<i>Gamifying for Networker</i> • Satisfaction of relatedness	<i>Gamifying for Philanthropists</i> • Satisfaction of purpose	<i>Gamifying for Philanthropists</i> • Satisfaction of purpose
Self-seeker (giving, helping, sharing)						

To illustrate the identification of restrictions and elements in the individual motivational strategy ($Y \leq I\text{-mot goal}$), let us see the “*Gamifying for Dodecad Achiever and Conqueror*” indicated in [Table 2](#), this strategy was identified from the guidelines of Dodecad model in which the behaviors of *accomplishing* and *comparing* are indicated as adequate to motivate achievers and consumers. In this case, the expected benefits to accomplish a goal, and then, compare it against the accomplishments of others is enjoyable for achievers. This benefit is represented as the individual motivational goal “*Satisfaction of mastery*” (*I-mot goal*) based on the Dan Pink motivation theory ([PINK, 2011](#)). According to this theory, mastery is a inherit human need that love to get better at stuff enjoying satisfaction from personal achievement and progress.

Step (3): Defining Individual Gameplay Strategies

Individual gameplay strategies (*I-gameplay strategy*) are inferred from the individual motivational strategies ($Y \leq I\text{-mot goal}$) identified in the step (2). Game elements are defined to support the behaviors indicated in the guidelines of individual motivational strategies, and so obtain the expected benefits indicated as individual motivational goal. [Table 3](#) shows the results of this step for the ontological model to personalize the gamification in Peer-tutoring scenarios.

Table 3 – Individual gameplay strategies to gamify Peer-tutoring scenarios

Achievement fun	Social fun	Facilitated-personal fun
<p>Primary focus (P):</p> <ul style="list-style-type: none"> • Gamifying for Dodecad Achiever • Gamifying for Consumer <p>Secondary focus (S):</p> <ul style="list-style-type: none"> • Gamifying for Consumer • Gamifying for Dodecad Achiever 	<p>Primary focus (P):</p> <ul style="list-style-type: none"> • Gamifying for Dodecad Socializer • Gamifying for Networker <p>Secondary focus (S):</p> <ul style="list-style-type: none"> • Gamifying for Networker • Gamifying for Dodecad Socializer 	<p>Primary focus (P):</p> <ul style="list-style-type: none"> • Gamifying for Philanthropists • Gamifying for Self-seekers <p>Secondary focus (S):</p> <ul style="list-style-type: none"> • Gamifying for Self-seekers • Gamifying for Philanthropists
<p>What to use:</p> <ul style="list-style-type: none"> • Challenges • Certificates • Levels/progression system • Point system (levels/progression) • Physical-reward system (certificates) • Leaderboard system (levels/progression) • Badge system (level/progression) • Virtual-economy system • Lottery system 	<p>What to use:</p> <ul style="list-style-type: none"> • Social-status (social status) • Point system (social status) • Physical-reward system (social status) • Leaderboard system (social status) • Badge system (social status) • Virtual-economy system • Lottery system 	<p>What to use:</p> <ul style="list-style-type: none"> • Meaning/purpose • Access system • Collect/trade system • Gifting/sharing system • Point system (meaning/purpose) • Physical-reward system (meaning/purpose) • Leaderboard system (meaning/purpose) • Badge system (meaning/purpose) • Virtual economy system • Lottery system

The individual gameplay strategies indicated in the [Table 3](#) are:

- *Achievement fun gameplay strategy*: is an individual motivational strategy in which the system recognizes achievements through game challenges, certificates and level/progression. To satisfy the mastery need, the system must try to produce in the participants the feel that they are achieving something by performing the interactions indicated by the Peer-tutoring scripts. Thus, the system would use a point system to indicate the levels/progression in the CSCL script, and when the CL scenario is completed as a game challenge, a certificate would be given by a physical-reward system. The leaderboard system would indicate the level/progression of the script. Badges would be obtained by the participants at the end of CL scenario according to the level/progression in the script. Finally, virtual-economy and lottery systems would establish the relation between the levels/progression of the script and the points, ranking in the leaderboard and badges.
- *Social fun gameplay strategy*: is an individual motivational strategy in which social status is used to support the feeling of relatedness. In this sense, the system should provide some form of social network/group to indicate and/or create group/collective game elements. Thus, the system would use a points system with a social status system to indicate points gathered by the participant as group. When the CL scenario is completed, the system would give a physical reward for the groups. A leaderboard would provide rankings by groups to indicate the social status of groups. Badges for groups with a social status would be given by the system to groups when the CL scenario is completed. Finally, virtual-economy and lottery systems would establish the relation between the social status of groups in CL scenarios, and the points, physical-rewards, leaderboards, and badges.
- *Facilitated-personal fun gameplay strategy*: is an individual motivational strategy in which the excitement from changing the system satisfy the need of purpose. This satisfaction comes from collection and trading valuable things. So when participants help to others, game elements are collected to be converted into something that has a meaningful value. Thus, meaning/purpose should be given to game elements such as points, physical-rewards, leaderboards, and badges, so that the system provides a collect/trade system to change these element for gifting and/or sharable elements (such as elements to customize the avatars, elements to change part of the system).

Employing the information of [Table 3](#), twelve ontological structures to represent gamified Peer-tutoring scenarios have been formalized in the ontology OntoGaCLEs to define the model to personalize the gamification in Peer-tutoring scenarios based on the Dodecad model ([MARCZEWSKI, 2015b](#)). These structures in the ontological model are: *Gamified Peer Tutoring Scenario for Achievers*, *Gamified Peer Tutoring Scenario for Achiever/Consumer*, *Gamified Peer Tutoring Scenario for Consumer/Achiever*, *Gamified Peer Tutoring Scenario for Consumers*, *Gamified Peer Tutoring Scenario for Socializers*, *Gamified Peer Tutoring Scenario for*

for Socializer/Networker, Gamified Peer Tutoring Scenario for Networker/Socializer, Gamified Peer Tutoring Scenario for Networkers, Gamified Peer Tutoring Scenario for Philanthropists, Gamified Peer Tutoring Scenario for Philanthropist/Self-seeker, Gamified Peer Tutoring Scenario for Self-seeker/Philanthropist, and Gamified Peer Tutoring Scenario for Self-seekers.

[Figure 15](#) shows as example the formalization of *Gamified Peer Tutoring Scenario for Achiever/Consumer* in which the motivational strategy to enhance the learning strategy “*Learning by Teaching*” is “*Gamifying for Dodecad Achiever*,” and the motivational strategy to enhance the learning strategy “*Learning by being Taught*” is “*Gamifying for Consumer*.¹ These both motivational strategies are implemented by the gameplay strategy “*Achievement fun gameplay strategy*,” where the participants in the primary focus (P) are holders of *Achiever/Peer Tutor* roles, and the participants in the secondary focus (S) are holders of *Consumer/Peer Tutee* roles. As can be appreciated in the motivational strategy “*Gamifying for Dodecad Achiever and Consumer*,” the potential player for the *Dodecad Achiever role* has been defined as a *Peer Tutor*, and in the motivational strategy “*Gamifying for Consumer and Dodecad Achiever*,” the *Peer Tutee* has been defined as the potential player for the *Consumer role*.

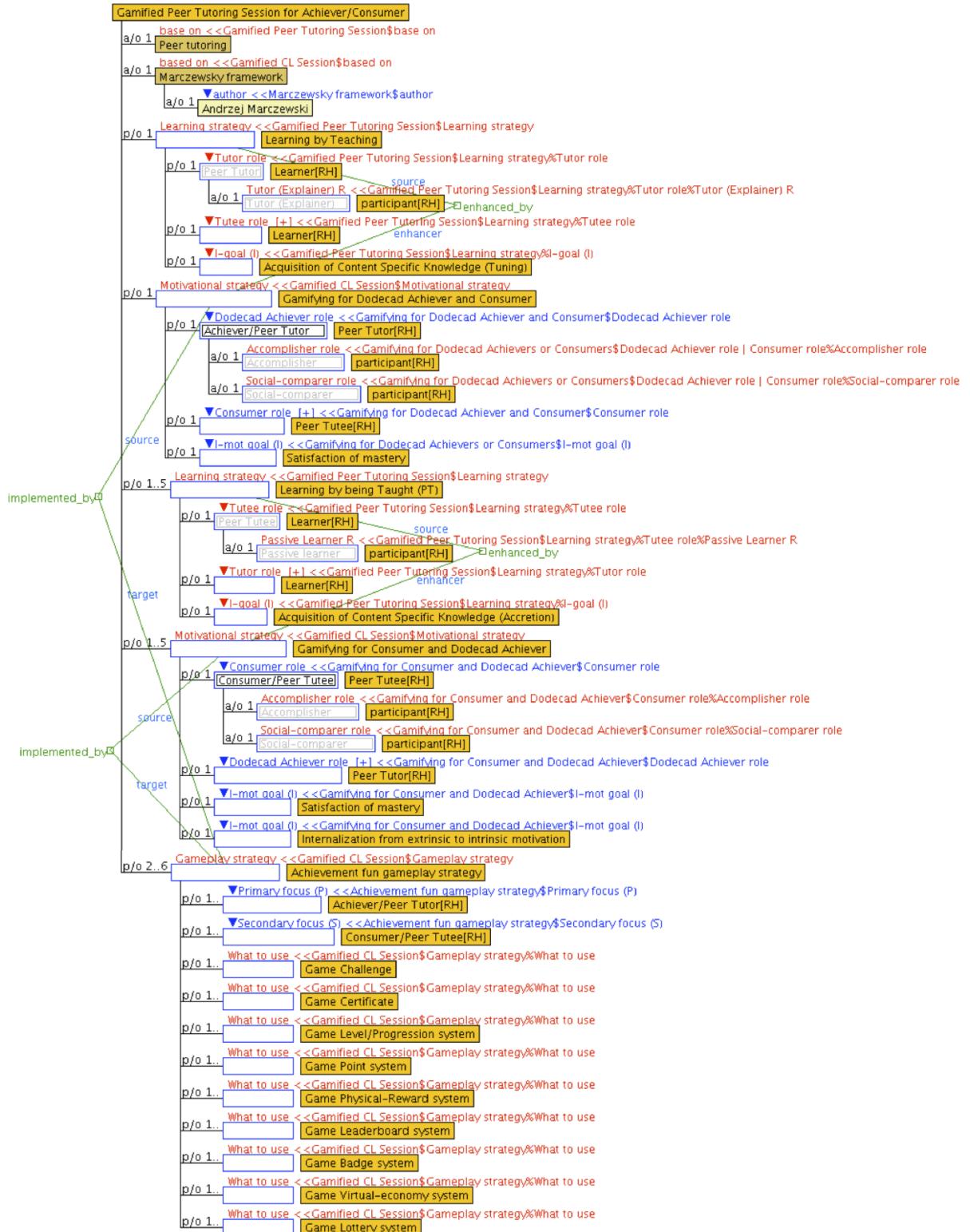
3.4 Concluding Remarks

In this chapter, concepts extracted from player types models and need-based theories of motivation have been formalized in the ontology OntoGaCLeS to solve the context-dependency related to the participants’ individual characteristics/traits when a CL scenario is been gamified to deal with the motivation problem causes by the scripted collaboration. The formalization of these concepts consist in ontological structures to represent individual motivational goals, player roles, motivational strategies, individual gameplay strategies, and gamified CL scenarios.

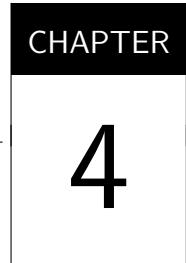
Through the use of ontological structures proposed in this chapter, it is possible the systematic building of ontology-based models to personalize gamification in CL scenarios based on player types models. This usefulness is demonstrated through an example in which information of Dodecad player type model, is employed to formalize an ontological model to personalize the gamification in Peer-tutoring scenarios. Employing the same formalization, it is possible to obtain ontological models to personalize the gamification in CL scenarios based on other player type models, such as the Yee’s model ([YEE, 2006](#)), Borges’ player type model ([BORGES et al., 2016](#)), and BrainHex player type ([NACKE; BATEMAN; MANDRYK, 2014](#)).

With the ontological structures proposed in this chapter, computer-based mechanisms could be built to set player roles and game element for each participant in CL sessions. These mechanisms will use the ontological structures formalized here as a knowledge-base that provide theoretical justification in an algorithm that help the users to gamify CL scenarios. [Chapter 4](#) shows a computer-based mechanism developed by the author of this thesis as proof of concept to set player roles for students in CL activities of Moodle platform.

Figure 15 – Ontological structure to represent “Gamified Peer Tutoring Scenario for Achiever/Consumer”



Source: Elaborated by the author.



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APPENDIX

A

ONTOLOGY ONTOGACLES: CONCEPTS, TERMS AND ONTOLOGICAL STRUCTURES

A.1 Tree Overview of States

A.1.1 *Motivation States*

- ▼ **w** Any
- ▼ **w** Common world
 - **w** Universal
 - **w** equivalence
- ▼ **w** Particular
 - **w** substrate
 - **w** entity
 - ▼ **w** physical
 - ▼ **w** occurrent
 - ▼ **w** stative
 - ▼ **w** stative_2
 - ▼ **w** state
 - ▼ **w** object state
 - ▼ **w** internal state
 - **w** hunger state
 - **w** life state
 - ▼ **w** Internal agent state
 - **w** Attitudinal state
 - **w** Affective state
 - **w** Temporal attitudinal state
 - **w** Future condition state
 - **w** Current condition state
 - **w** Aspiration
 - **w** Relevance
 - **w** Motivation state
 - **w** Motivated
 - **w** Intrinsic motivated
 - **w** Extrinsic motivated
 - **w** Not motivated
 - **w** Confidence

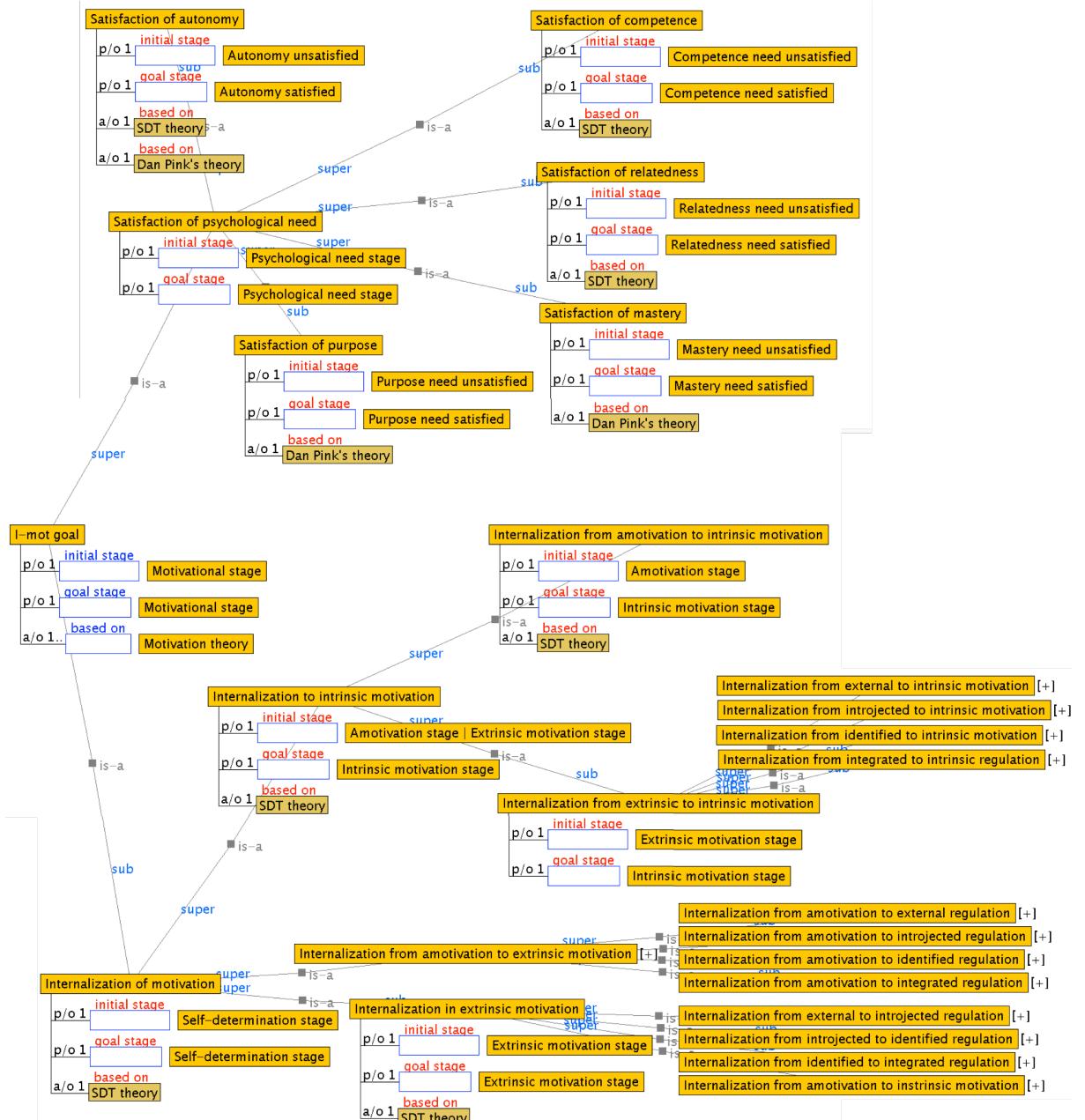
A.1.2 Psychological Need States

- ▼ **w state**
- ▼ **w object state**
- ▼ **w internal state**
 - **w hunger state**
 - **w life state**
- ▼ **w Internal agent state**
 - **w Attitudinal state**
 - **w Progression state**
 - **w Developmental state**
 - **w Cognitive process state0**
- ▼ **w Human need state**
 - **w Existence need state**
 - ▼ **w Psychological need state**
 - ▼ **w Relatedness need state**
 - **w Love/belonging need state**
 - ▼ **w Power need state**
 - Having need to demonstrate power
 - Not having need to demonstrate power
 - **w Display status need state**
 - **w Feel admiration need state**
 - ▼ **w Social-esteem need state**
 - ▼ **w Social status need state**
 - Having need to demonstrate his/her social status
 - Not having need to demonstrate his/her social status
 - Having need of relatedness
 - Not having need of relatedness
 - ▼ **w Growth need state**
 - ▼ **w Self-actualization need state**
 - **w Individuality need state**
 - **w Creativity need state**
 - ▼ **w Autonomy need state**
 - Having need of autonomy
 - Not having need of autonomy
 - ▼ **w Purpose need state**
 - Having need of purpose
 - Not having need of purpose
 - ▼ **w Self-esteem need state**
 - ▼ **w Mastery need state**
 - Having need of mastery
 - Not having need of mastery
 - ▼ **w Competence need state**
 - Having need of competence
 - Not having need of competence
 - ▼ **w Self-confidence need state**
 - Having need of self-confidence
 - Not having need of self-confidence
 - **w Ind. personality trait state**
 - **w Internal non-agent state**

A.1.3 Individual Personality Trait States

- **Ind. personality trait state**
- **Game style preference state**
 - Having preference for acting on the system
 - Having preference for interacting on the system
 - Having preference for acting with others users
 - Having preference for interacting with others users
- **Users/System state**
- **Interacting/Acting state**
- **MBTI personality traits state**
 - **Introversion/Extraversion**
 - Having introversion orientation
 - Having extraversion orientation
 - **Intuition/Sensing**
 - Having intuition orientation
 - Having sensing orientation
 - **Feeling/Thinking**
 - Having feeling orientation
 - Having thinking orientation
 - **Perception/Judging**
 - Having perception orientation
 - Having judging orientation
- **Game liking preference state**
 - Liking to help others to orient themselves in new situations
 - Liking to share my knowledge
 - Liking to put effort according to the reward
 - Liking achievement-components
 - Liking social-components
 - Liking immersion-components
 - Liking discovery-components
 - Liking customization-components
 - Liking competition-components
 - Liking advancement-components
 - **Liking mechanics-components**
 - Having a non-positive liking for mechanics-components
 - Having a negative liking for mechanics-components
 - Having indifference liking for mechanics-components
 - Having indifference liking for mechanics-components
 - Having a non-negative liking for mechanics-components
 - Having a positive liking for mechanics-components
 - Having indifference liking for mechanics-components
- **Big five personality traits state**
 - Openness state
 - Conscientiousness state
 - Extraversion state
 - Agreeableness state
 - Neuroticism state
 - Having sensitive/nervous orientation
 - Having secure/confident orientation

A.2 Individual Motivational Goal (I-mot goal)

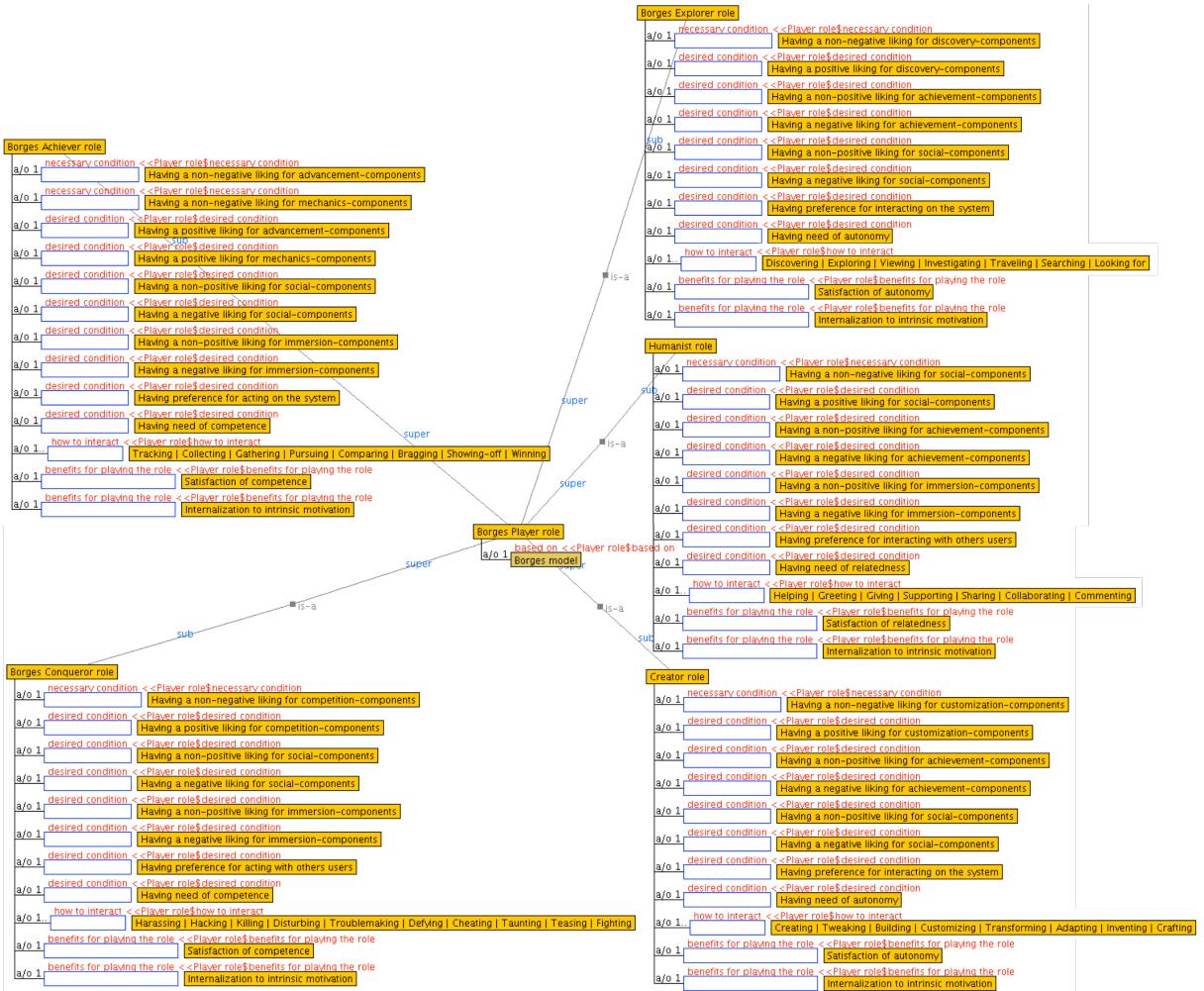


A.3 Player Role

A.3.1 Player Roles based on the Bartle Model



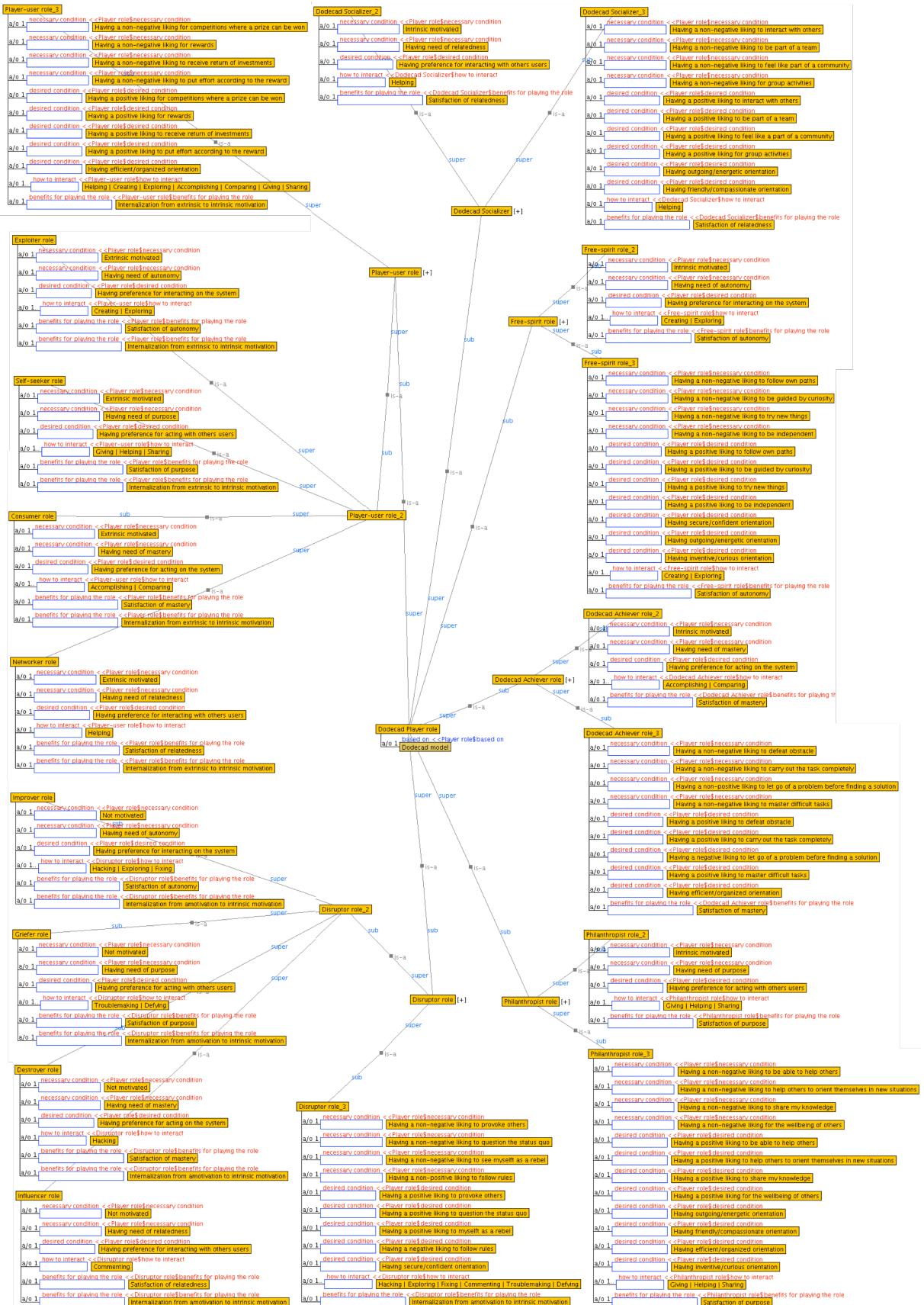
A.3.2 Player Roles Based on the Borges Model



A.3.3 Player Roles Based on the Yee Model



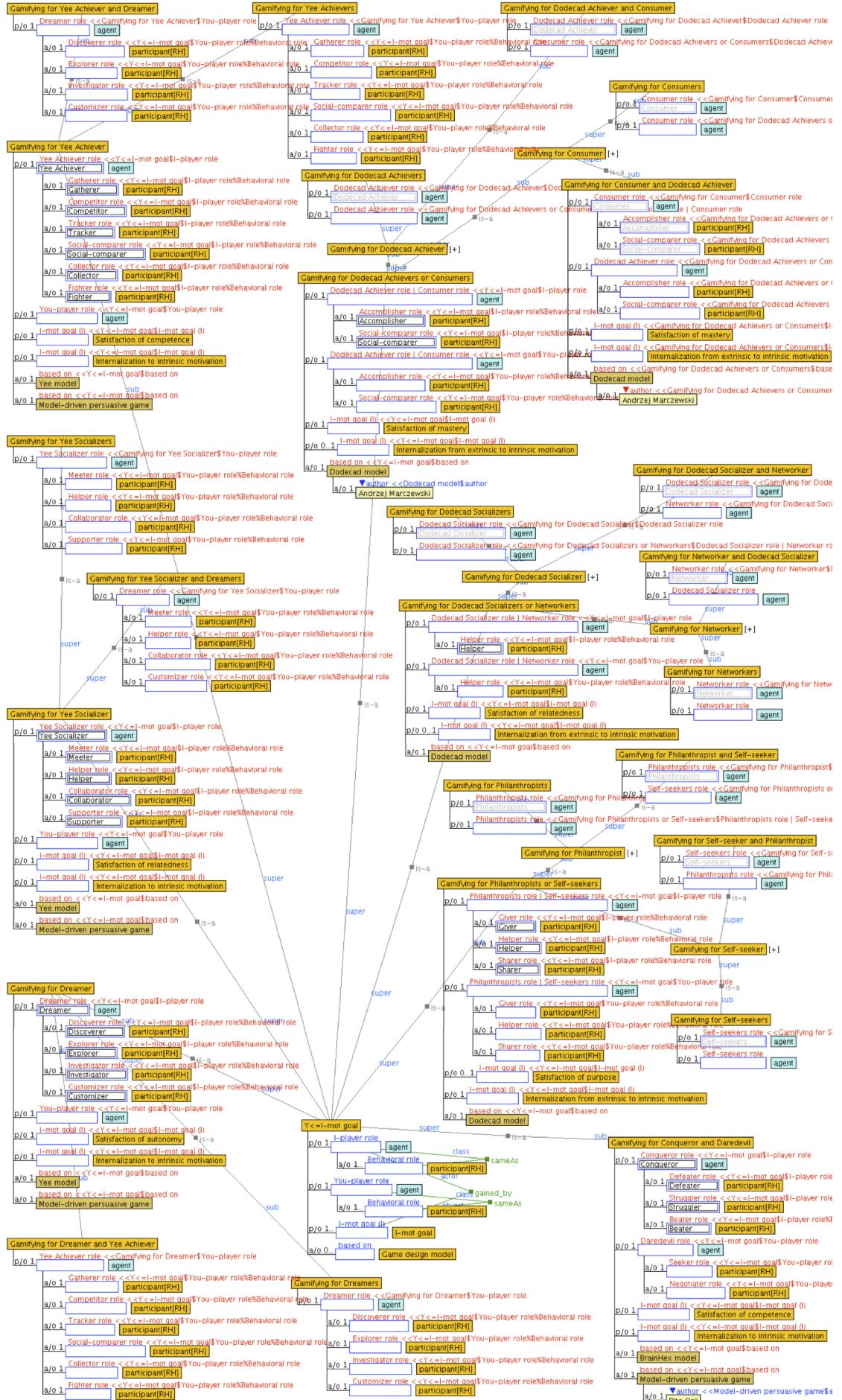
A.3.4 Player Roles Based on the Dodecad Model



A.3.5 Player Roles Based on the BrainHex Model



A.4 Individual Motivational Strategy ($Y \leq I$ -mot goal)



A.5 Individual Gameplay Strategy (I-gameplay strategy)

