POLITICAL CONFLICT AND INSTITUTIONAL CHANGE IN LATIN AMERICA. A COMPARATIVE ANALYSIS THROUGH FUZZY SETS

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Abstract: In the late 1980s, QCA (Qualitative Comparative Analysis) positioned itself as a qualitative alternative to quantitative studies that attempted to explain, from a comparative perspective, the analysis of more complex social and cultural formations such as countries, societies, groups or social movements. The analytical approach of this type of macro-structures, given their complexity, required research strategies that would encourage a more intensive analysis based on a reduced number of cases. The purpose of this paper is to describe some of the considerations that guide the analysis of causal configurations with fuzzy sets, showing their application through a study of the implication of transgressive contention, anti-status quo leadership and elite division in the production of institutional changes of substantial nature.

Key words: causal configurations; fuzzy sets; political conflict and institutional change.

Conflicto político y cambio institucional en América Latina. Un análisis comparado a través de conjuntos difusos

Resumen: A finales de la década de los ochenta, QCA (Qualitative Comparative Analysis) se situó como una alternativa cualitativa frente a los estudios cuantitativos que trataban de explicar, desde una perspectiva comparada, el análisis de formaciones sociales y culturales más complejas como países, sociedades, grupos o movimientos sociales. El abordaje analítico de este tipo de macroestructuras, dada su complejidad, precisaba de estrategias de investigación que propiciaran un análisis más intensivo a partir de un número reducido de casos. El objetivo de este trabajo es describir algunas de las pautas que guían el análisis de configuraciones causales con conjuntos difusos, mostrando su

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aplicación a través de un estudio sobre la implicación de la contienda política transgresiva, el liderazgo anti status quo y la fragmentación de la elite en la producción de cambios institucionales de carácter sustancial.

Palabras clave: configuraciones causales; conjuntos difusos; conflicto político y cambio institucional.

1. THE ANALYSIS OF CAUSAL CONFIGURATIONS IN FSQCA FUZZY SETS

Calibration and membership values in fuzzy sets

The QCA analysis supposes the explanation of social phenomena from the comparison of attributes between different cases and the explanation of outcomes from the configuration of causes (Ragin, 2000). The first QCA model was based on the comparison of phenomena through closed categories (*crip sets QCA*). The comparison between the cases distinguished, in dichotomous terms, the presence or absence of attributes or variables in a sample of cases (Ragin, 1987). A decade later, the QCA technique proposed a new structure through the configurative analysis of causes within fuzzy sets (Ragin, 2000). The purpose of this article is to provide general guidelines to obtain a clear understanding of the analysis strategy from fuzzy sets, showing its application in the field of collective action studies.

As previously mentioned, in the assumption of open categories or fuzzy sets (*fuzzy sets QCA*) a phenomenon is analyzed through degrees of membership of the cases in each of the sets. Each variable is treated as a set, and each case is located within it through values that show degrees of partial or complete membership within a scale of 0 and 1. The proximity or distance of the cases with respect to the two reference values will reveal strong and weak memberships in each set. A same case can present different values of membership in each of the sets or variables, which reflects heterogeneity and, therefore, increases the probability of having results with a greater explanatory potential.

TABLE 1
MEMBERSHIP VALUES IN FUZZY SETS

Crisp sets versus Fuzzy sets				
Crisp sets (1)	Three value sets (2)	Five value sets (3)	Seven value sets (4)	Continuous values sets (5)
1= completely in	1= completely in	1= completely in 0.75= more in than out	1= completely in 0.83= almost full membership 0.67=more in	1= completely in Numerical values indicate that the degree of membership is more to the in than the out (0.5<xi <1)
	0.5 = *crossover* neither in nor out	0.50= *crossover* neither in nor out	0.50= *crossover* neither in nor out	0.5= *crossover* neither in nor out
0= completely out	0= completely out	0.25= more out than in 0= completely out	0.33= more to the out 0.17= almost completely out 0= completely out	Numerical values indicate that the degree of membership is more to the out than the in (0<xi <o.5)

Source: (Ragin, 2000, p. 156).

Ragin (2008, p. 88) proposes two methods to perform empirically consistent calibrations: the direct method and the indirect method. The direct method is based on the estimation of the membership values of the cases to each set by means of membership probability distributions at the maximum value. In the indirect method, the degrees of membership will depend on the number of intervals the researcher determines, as shown in columns 2, 3 and 4 of Table 1. In the indirect method, the researcher performs a previous sorting of the cases, grouped qualitatively based on their own theoretical criteria. Subsequently, the classification will be reevaluated, considering the

proportion of numerical intervals that the researcher has used to integrate the set using a fractional logarithmic model[2].

Necessity and Sufficiency

In the explanation of results from criteria of necessity and sufficiency, fsQCA uses analytical techniques that seek to diminish the possibility of making erroneous explicative inferences due to imperfect evidence (Ragin, 2000). Within these techniques, there are some based on probabilistic methods that evaluate the empirical force of the arguments of necessity and sufficiency, considering the total number of cases, the number of cases that show the result of interest and the proportion thresholds that the researcher assigns to the possible degrees of sufficiency. These values are subjected to a probabilistic test that will determine the degree of sufficiency of a certain causal configuration[3].

In studies with few cases, the only possible test is obtained through the truth table. The truth table integrates the theoretical or hypothetical configurations that derive from the possible logical combinations of presence and absence between each of the variables or causes. These configurations will be part of the rows of the table. In fsQCA, the number of hypothetical configurations derives from the formula 2^k. Where value 2» corresponds to two possibilities of membership to a set, complete membership or non-membership and «k» is the number of causal configurations[4].

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[2] Said model can be created through the STATA software, under the function fracpoly or fp regression procedure. (Ragin, 2008, p. 96).

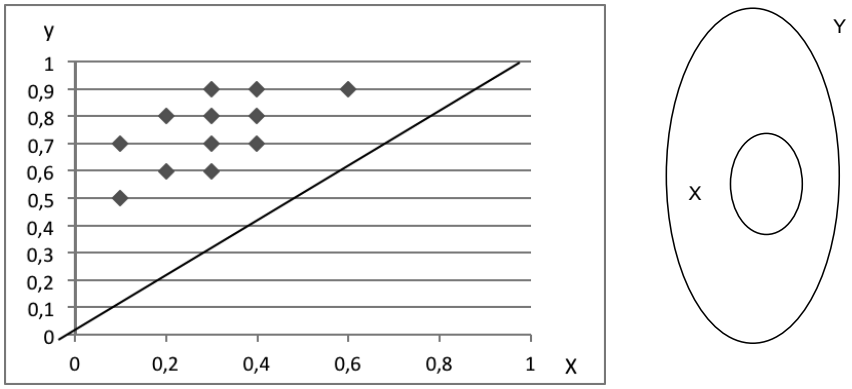
[3] Ragin (2000) proposes the test of Hays (1981, p. 211-214). z= (P-p) -1/2N/Ö pq/N. Where P is the observed proportion of cases that represent the result of interest within the total of the sample, N is the number of cases that present the causal configuration, p is the threshold of proportion (0.80 or 0.60) and which is equal to 1-p. The consistent levels of sufficiency yield results that should be greater than the threshold of proportion.

[4] This presupposes a certain caution on the part of the researcher when identifying the possible explanatory causes since the determination of the hypothetical configurations is exponential. In a study in which the phenomenon is explained from 3 conditions or variables, it will determine 8 hypothetical configurations (2^3=8); 4 conditions 16 hypothetical configurations (24 =16) and so forth. A large number of hypothetical configurations before a small number of cases will presuppose a problem of limited diversity; namely, a significant number of counterfactuals or assumptions without the possibility of testing with empirical evidence.

The explanation in terms of necessity and sufficiency stems from arithmetic relationships between membership values. In the case of necessity, the result is a subset of the cause; Therefore, the membership value in the result will be less than or equal to the membership value of the cause ($Y_i \leq X_i$). Where «X» means the cause or configuration of causes, «Y» means the result and «i» means the individual values in each of the observations. In the case of enough conditions, the membership value of the cause is less than or equal to the value of the result, the cause is a subset of the result ($X_i \leq Y_i$). (Ragin, 2000, 2008, 2009).

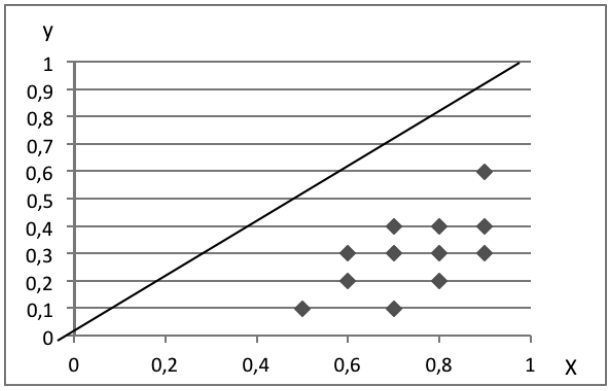
In fsQCA, these relations are represented by a graph in which the values of the result variable (Y) and the values of the cause or configuration of causes are incorporated[5].

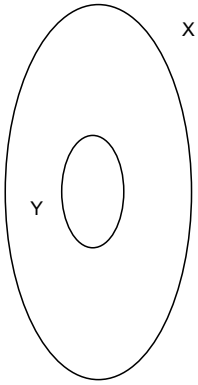
GRAPHIC 1
SUFFICIENT CONDITIONS, CASES ARE LOCATED AT THE TOP OF THE PLOT (X≤Y)



[5] The plot in fsQCA is integrated by two vectors corresponding to (X) cause or configuration of causes and to (Y) the result. When X represents a configuration of causes, it is possible to make the representation of these two axes, even if it is a configuration of two or three causes. In this case, the logical operators apply to represent configurations with conjunction (the minimum membership value of the sets is taken), disjunction (the maximum membership value of the sets) or negation of causes (1-membership value).

GRAPHIC 2
NECESSARY CONDITIONS, CASES ARE LOCATED
AT THE BOTTOM OF THE PLOT (Y≤X)





CONSISTENCY AND COVERAGE

The explanation of results under relations of necessity and sufficiency is carried out through adjustment parameters, namely, consistency and coverage (Ragin, 2009, p. 108). These parameters aim to reflect the theoretical and empirical relevance of the conclusive arguments about the necessity and sufficiency of the causal relations expressed in the result.

Consistency seeks to reflect the extent to which the evidence is consistent with the causal relationships expressed. It means the proportion of cases that correspond to the equation Y≤X or that are located at the bottom of the graph. «Consistency within fuzzy sets reflects the degree to which one subset is contained within another» (Ragin, 2009, p. 108).

The formula that expresses the degree of consistency in relations of necessity is:

$$(Y \leq X) = \sum (\min(X_i, Y_i))/\sum Y_i$$

The consistency of the set of Y as a subset of X results from its intersection, expressed as a proportion of the set of Y. As a result of the application of this formula, the level of significant consistency must yield 1 or the values closest to 1. If the result gives values below 1, in a relatively small sample of cases, there can be no significant consistency within the argument of necessity of a cause or set of causes (Ragin, 2009, p. 110).

In the case of consistency that indicates relations of sufficiency, the same arithmetic criterion corresponds; the formula is expressed as follows:

$$(X \leq Y) = \sum (\min(X_i, Y_i)) / \sum X_i$$

Coverage estimates the weight or empirical relevance of a causal configuration in relation to the total of cases that display the result. Ragin (2008) points out that coverage can be seen as the proportion of positive cases that are explained from a given condition or causal configuration.It is represented through the following formula:

$$\text{Coverage} = \sum (\min(X_i, Y_i)) / \sum Y_i$$

There is a possibility that in some results the consistency and the coverage do not coincide, as they may yield a high consistency and a low coverage. This does not imply the irrelevance of a configuration. Although its empirical weight is limited, which may be related to the presence of different configurations that give rise to the same result (*equifinality*) or to the selection criteria of the sample, its relevance can continue in the theoretical guidelines proposed by the researcher (Ragin, 2000, 2008).

The preceding paragraphs have sought to describe, in general terms, some of the methodological guidelines that integrate the analysis of causal configurations in fuzzy sets. In the following sections, we will seek to show the application of this methodology in a study that seeks to demonstrate the implication of the transgressive contention, the leadership with anti-status quo strategy and the elite division with institutional changes by replacement (Thelen and Mohoney, 2010).

2. POLITICAL CONFLICT AND INSTITUTIONAL CHANGE THROUGH THE ANALYSIS OF CAUSAL CONFIGURATIONS IN FUZZY SETS

Like other comparative approaches, fsQCA is based on the comparison of attributes within a sample of cases that are comparable to each other because of the similarities or differences they present with respect to those attributes. As stated in previous paragraphs, the determination of the attributes to be compared between each case derives from the way concepts are defined in operational terms. The analysis of the attributes in each of the cases will be systematized from the assignment of values that, through the

direct calibration method, will be transformed into degrees of membership within the sets.

Theoretical model

The studies of Tarrow, McAdam & Tilly (2004) and Thelen & Mahoney (2010) allow this work to establish a hypothesis which maintains that institutional changes, that modify the functional and organizational structure of the political regime, may be produced by the joint incidence of three variables: 1) social mobilization in the form of a transgressive contention, 2) the division of the political elite and 3) the presence of a leadership with an anti-status quo discursive strategy. The results presented in this paper are part of a broader research on political conflict and institutional change. This article shows the operational construction of each of the three variables described above and the results obtained from their measurement. The analysis model and operationalization of the variables are showed in the following figures:

Figure 1
ANALYSIS MODEL

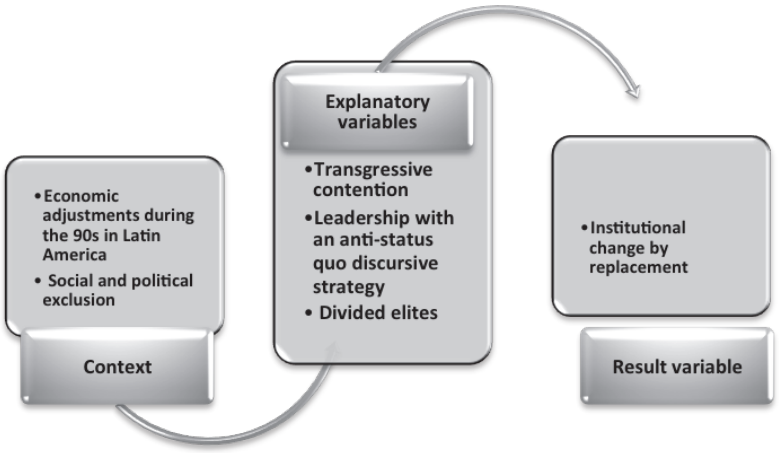


FIGURE 2
INSTITUTIONAL CHANGE BY REPLACEMENT

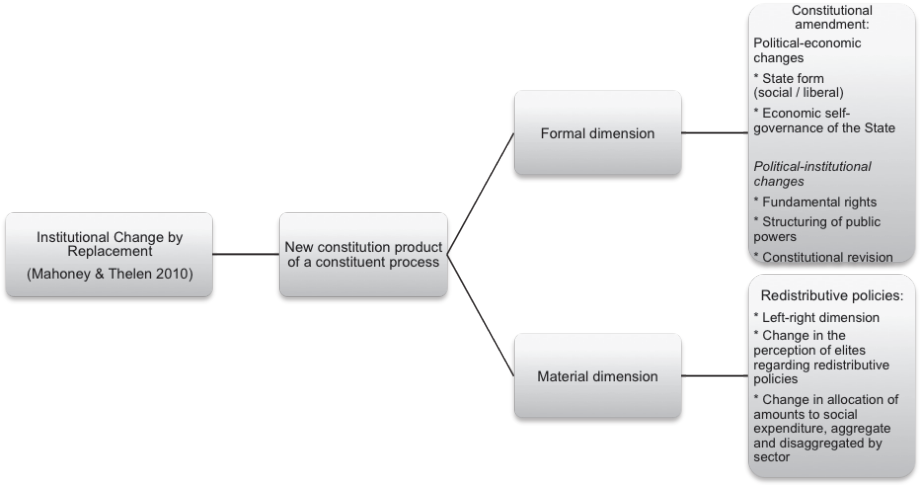


FIGURE 3
TRANSGRESSIVE CONTENTION

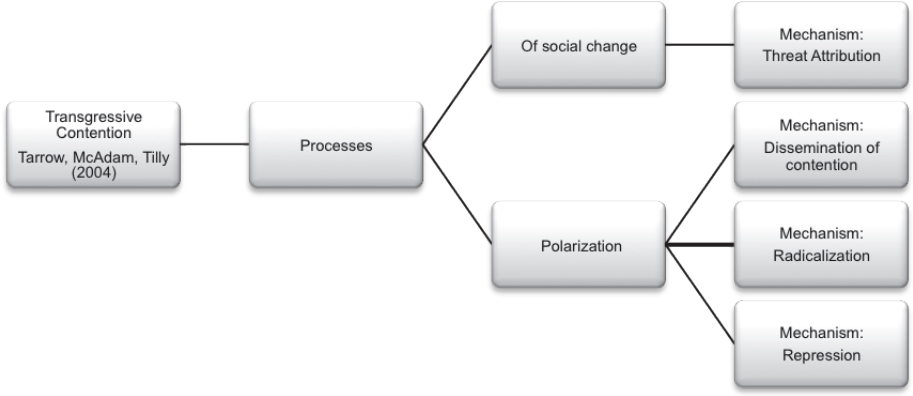


FIGURE 4
LEADERSHIP WITH AN ANTI-STATUS QUO DISCURSIVE STRATEGY

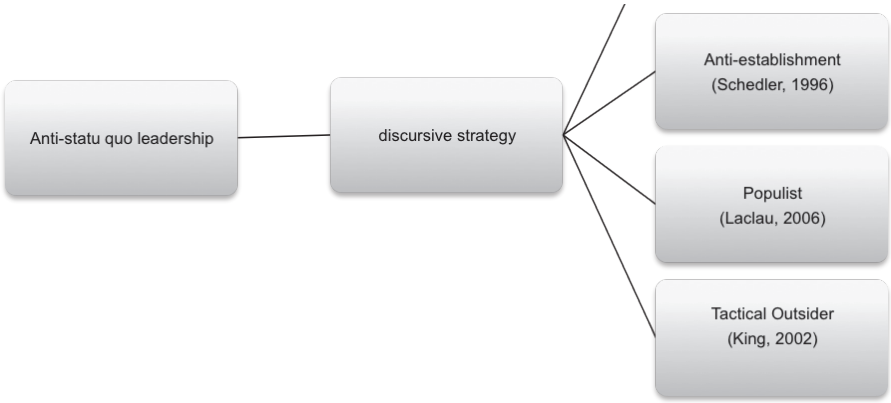
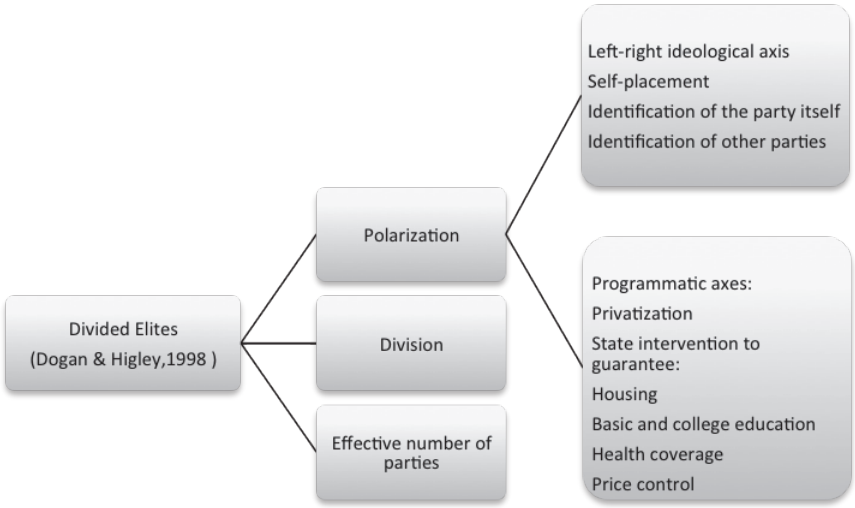


FIGURE 5
DIVIDED ELITES



Empirical Model: Case selection

In QCA cases, rather than integrating a sample, they constitute a criterion of unit grouping that share a set of traits linked to a result. Cases must have some parallelism and be comparable in certain specific dimensions; their association with the result will be one of the primary considerations at the time of selection.

Ragin (1987) proposes the indirect method of differences, based on Mill's combined method. This method consists of integrating a set of cases with the same result in order to identify the common characteristics among them. Subsequently, a set of cases whose characteristic is the absence of the result will be integrated. The contradictory results between the two groups of cases would reveal the causes or configurations of causes that may be more consistent to explain an outcome in terms of necessity and sufficiency.

The incorporation of negative cases in the framework of the comparison is also described in the work of Goertz and Mahoney (2004). The selection criterion for negative cases is based on the possibility that in them, given the similarity with positive cases, the presence of the result could also have been possible[6].

The grouping criterion of the cases can be determined by their similarity regarding membership values in some of the sets. This criterion can consider the cases that are located within the space of properties defined by the values that are placed between the two closed values: total membership (1) and no membership to the set (0). This criterion may also consider those cases that are above or below the threshold of 0.5 (Ragin 2000).

In order to establish patterns of comparison of the cases based on their similarities in one of the explanatory variables, this paper selected a sample of cases that present similarities in the explanatory variable, Transgressive Contention. This variable is considered as a selection criterion due to the fact that this type of mobilization, as a form of subversive mobilization, is involved in institutional change by replacement (Thelen and Mahoney 2010).

The cases that present episodes of mobilization in the form of a Transgressive Contention are the following:

1. Venezuela (Caracazo, 1989)
2. Bolivia (Gas War, 2003)
3. Ecuador 1 (Patriotic Front for the Defense of the People, 1997)
4. Ecuador 2 (Rebellion of the Outlaws (forajidos), 2005)
5. Argentina (Cacerolazo, 2001)
6. México (Zapatista Army of National Liberation, 1994)

[6] This is called the possibility Principle.

According to the dimensions of analysis of the variable described in Figure 3, all these cases exhibit the mechanisms of perception of threat, dissemination of contention, radicalization and repression.

It is not possible to establish a homogeneous criterion of periodicity for the analysis of the cases. These events unfolded at different times and the depth of the institutional changes that followed them also differs. However, all these phenomena developed in Latin America as a kind of syndrome of the late twentieth century and beginning of the twenty-first. According to the dimensions of analysis of the dependent variable, institutional change by replacement is defined by the existence of a new constitution, product of a constituent process, with substantial transformations at the formal and material levels.

Results in the variable, Institutional Change by Replacement

Table 2
COMPARATIVE MATRIX OF THE RESULTS OF EACH CASE IN THE DEPENDENT VARIABLE: INSTITUTIONAL CHANGE BY REPLACEMENT (FORMAL FIELD: CONSTITUTIONAL CHANGE)

CONTITUTIONAL CHANGE								
	Political-economic		Political-institutional					
Country	Social Status	Powers in economic matters	Rights	Presidential Powers	Electoral system	Reform of the judiciary	Revision	Σ
México	0	0	2	0	3	3	0	8
Ecuador 1	2	0	2	2	2	1	2	11
Venezuela	3	3	3	3	2	3	3	20
Bolivia	3	3	3	2	3	3	3	20
Ecuador 2	3	3	3	2	3	3	3	20

Values:
0=No change
1=Marginal change
2=Moderate change
3= Profound change

*Argentina had no constitutional change in the period studied

TABLE 3
COMPARATIVE MATRIX OF THE RESULTS IN THE DEPENDENT VARIABLE: INSTITUTIONAL CHANGE BY REPLACEMENT (MATERIAL FIELD: REDISTRIBUTIVE POLICIES)

REDISTRIBUTIVE POLICIES[7]											
	Opinion of the parliamentary elite						**Social expenditure investment percentage of the GDP**				
Country	Left— Right *	State intervention Education	State intervention Health	State intervention housing	Privatization Services	Direct and indirect taxes	Social spending	Education	Health	Housing	Σ
Argentina	1	3	3	1	1	1	1	1	2	2	16
México	1	1	1	1	2	3	1	1	1	3	15
Ecuador 1	3	1	1	1	2	1	1	1	1	1	13
Venezuela	1	2	1	3	2	3	3	3	1	1	20
Bolivia	1	2	1	1	1	2	1	1	3	1	14
Ecuador 2	3	2	2	3	3	2	3	3	3	2	26

Values:

1=Marginal change
2=Moderate change
3=Significant change

* This dimension does not correspond to redistributive policies. However, it is included in the analysis since it can be related to the orientation of the elites regarding the implementation of those policies.

[7] The values for the case of opinion of the parliamentary elite were allocated considering the difference of means between M1 (moment 1, before the arrival of new actors) and M2 (moment 2, after the arrival of new actors after the episodes of Social Protest) within each case. The opinions of the elites were taken from the PELA Survey of the Observatory of Representative Institutions (OIR), Iberoamerican Institute, and University of Salamanca.

TABLE 4
COMPARATIVE MATRIX OF THE EXPLANATORY VARIABLE: TRANSGRESSIVE CONTENTION

	Mechanisms of Transgressive Contention											
Episode	**Attribution of threat**			**Dissemination of Contention**			**Repression**			**Radicalization**		
Cacerolazo 2001	A	M	B	A	M	B	A	M	B	A	M	B
	X			X			X			X		
Civic strike 1997	X			X					X	X		
Rebellion of the Outlaws 2005	X			X				X		X		
Gas War, 2003	x			x			X			X		
Caracazo, 1989	X				X		X			X		
EZLN, 1994	X					X	X			X		

Values:
A=High; M=Intermediate; B=Low

Attribution of threat: Facts directly linked to the protest according to the media, frames of reference and studies that describe these episodes
Dissemination of contention: Its extension to other social sectors or at a territorial level
Repression: Employment of the army and people killed in the events
Radicalization: In the claims and in the repertoires of action

TABLE 5
COMPARATIVE MATRIX OF THE EXPLANATORY VARIABLE: TRANSGRESSIVE CONTENTION

	Mechanisms of Transgressive Contention				Total
Episode	**Attribution of threat**	**Dissemination of contention**	**Repression**	**Radicalization**	
Cacerolazo	3	3	3	3	12
Gran Paro Cívico	3	2	1	3	9
Rebelión de los Forajidos	3	3	2	3	11
Guerra del Gas	3	3	3	3	12
Caracazo	3	1	3	3	10
EZLN	3	1	3	3	10

TABLE 6
COMPARATIVE MATRIX OF THE EXPLANATORY VARIABLE: LEADERSHIP WITH AN ANTI STATUS-QUO DISCURSIVE STRATEGY

	Anti Status-Quo Discursive Strategy						
	Rupturist		**Anti-establishment**	**Populist**			**Tactical Outsider**
	Diagnosis of the past and current situation	Type of change and instrument for change	De-legitimization of the previous government and /or traditional parties	Claim within the message of the chain of equivalences	Dichotomous vision of social space	Elements of collective identity	
Néstor Kirchner	Negative	Gradual through reforms	No	Yes	No	Yes	No
Ernesto Zedillo	Positive	Gradual through reforms	No	No	No	No	No
Jorge Mahuad Witt	Negative	Continuity of the economic and political model	No	No	No	No	No
Hugo Chávez	Negative	Radical. At first through armed forces. In a second moment through a new Constitution	Yes	Yes	Yes	Yes	Yes
Rafael Correa	Negative	Substantial through a new Constitution	Yes	Yes	Yes	Yes	Yes
Evo Morales	Negative	Substantial through a new Constitution	Yes	Yes	Yes	Yes	No

TABLE 7
COMPARATIVE MATRIX OF THE EXPLANATORY VARIABLE: LEADERSHIP WITH AN ANTI STATUS-QUO DISCURSIVE STRATEGY

	Anti-Status Quo Discursive Strategy				Collapse of the Party system	Total
	Rupturist	Anti-establishment	Populist	Tactical Outsider		
Néstor Kirchner	1	0	1	0	0	2
Ernesto Zedillo	0	0	0	0	0	0
Jorge Mahuad Witt	0	0	0	0	0	0
Hugo Chávez	3	3	3	2	1	12
Rafael Correa	2	3	3	2	1	11
Evo Morales	2	3	3	1	1	10

Rupturist:
1 = The message contains at least one of the rupturist elements, either in the negative valuation of the previous situation or in the substantiality or radical in the instruments of change
2 = Presence of rupturist elements with instruments of substantial change, but without radicality in the ways of action
3 = Radicality in the ways used for change.

Anti-establishment:
1 = Attack on the traditional elite structure
2 = Criticism of the elite, the institutions, their value structure and the party system
3 = The departure of the elite as the only solution for change

Populist:
1 = There are references to the claim of the chain of equivalences in the message
2 = There is vindication and dichotomous construction of social space
3 = In the speech there is vindication of the chain of equivalences, dichotomous construction of social space and creation of new collective identities

Outsider/ tactical outsider:
1 = It is only located outside the traditional parties as a discursive tactic
2 = He is outsider in the field of party competition and, in speech, he places himself as an outsider

Collapse of the party system:
0 = There is no collapse of the traditional party system
1 = There is a collapse with the rise of leaders to power

TABLE 8
COMPARATIVE MATRIX OF THE EXPLANATORY VARIABLE DIVIDED ELITES[8]

Polarization index										
	Ideological axis left-right[9]			Programmatic axes						
				Privatization[10]		Intervention of the State to Guarantee[11]				
Country	Location from other parties	Location of own party	Self-location	Public services	Basic education	Housing	Health coverage	College education	Price control	Σ
México	2,62	1,30	0,73	0	0,15	0,23	0,15	0,21	0,35	0,64
Argentina	0,46	2,51	0,77	0	0	0,35	0,12	0,30	0,08	0,51

[8] This research focused on these three indicators, taking as an example the opinion of parliamentary elites. The variables of the PELA survey that have been selected are intended to measure the degree of polarization in the left right ideological dimension and in programmatic axes linked to the ideological orientation expressed by the elites (Ruíz and Otero 2013).

The variables of the survey selected for the calculation of the polarization in the left-right dimension are as follows:

1) Self location
2) Location of own party
3) Location by other parties

For the calculation of the polarization in programmatic axes the selected variables are the following:

— Privatization of public services
— State intervention to guarantee primary education
— State intervention to guarantee housing
— State intervention to guarantee health coverage
— State intervention to guarantee college education
— State intervention to guarantee price control

For the calculation of the polarization we will consider the weighted polarization formula of Taylor and Herman (1971) and Knutsen (1998), taken from Ruíz and Otero, 2013:

$$Pp\ \sum_j^J = 1\, P_j^p \left(\hat{X}_j - \bar{X}p\right)^2$$

Where:

P_j^p Is the proportion of seats that each party obtains over the total of 17.

P_j is the ideological average of the party j

P_p is the weighted average by the proportion of seats over 1 of the positions of all the parties in that scale $(\bar{X}A.\ P_A^p) + (\bar{X}A.\ P_B^p) + \ldots$

The results of the application of the polarization formula of the selected variables in each case are expressed in the following polarization index.

[9] Scale: left (1) to right (10).

[10] Scale: would privatize all (1) would not privatize any (5)

[11] Scale: no intervention (1) to very much intervention (4)

Polarization index										
	Ideological axis left-right			Programmatic axes						
				Privatization		Intervention of the State to Guarantee				
Country	Location from other parties	Location of own party	Self-location	Public services	Basic education	Housing	Health coverage	College education	Price control	Σ
Ecuador 1	3,24	1,54	1,41	0,50	0	0,11	0	0,26	0,41	0,78
Ecuador 2	4,72	3,54	1,88	0	0	0,17	0	0	0,20	1,17
Venezuela	3,22	0,84	0,30	0,29	0	0,12	0	0,37	0,35	0,61
Bolivia	6,19	2,26	2,26	0,24	0	0,10	0	0	0,15	1,24

Country	Fragmentation	Effective number of parties
México	0,58	2,38
Argentina	0,62	2,63
Ecuador 1	0,78	4,54
Ecuador 2	0,84	6,25
Venezuela	0,80	5
Bolivia	0,80	5

TABLE 9
COMPARATIVE MATRIX OF THE EXPLANATORY VARIABLE DIVIDED ELITES[12]

Country	Polarization	Fragmentation	NEPp	Total
Bolivia	3	3	3	9
Ecuador 2	3	3	3	9
Ecuador 1	2	3	3	8
Venezuela	1	3	3	7
México	1	1	1	3
Argentina	1	1	1	3

(1) low
(2) average
(3) high

The determination of the degree of polarization of each case has been made considering the distance between the highest average and the lowest average, divided by 3. The ranges that correspond to each category are the following: 1=(0.51 -0.753) 2=(0.753-1) 3=(1-1.24).

The determination of the degree of fragmentation follows the same mathematical criterion used for polarization. The ranges corresponding to each category are as follows: 1= (0.58-0.666) 2= (0.666-0.7529) 3= (0.752-0.84).

The assignment of the values given to the NEPp has been made considering the number of parties in relation to the fragmentation values. In this way, a two-party system with low fragmentation and low polarization levels was placed in value 1. In contrast, in the case of a multiparty system with higher levels of fragmentation and polarization, they were placed in category 3.

[12] This research focused on these three indicators, taking as an example the opinion of parliamentary elites. The variables of the PELA survey that have been selected are intended to measure the degree of polarization in the left right ideological dimension and in programmatic axes linked to the ideological orientation expressed by the elites (Ruíz and Otero 2013).

The variables of the survey selected for the calculation of the polarization in the left-right dimension are as follows:

1) Self location
2) Location of own party
3) Location by other parties

For the calculation of the polarization in programmatic axes the selected variables are the following:

Membership values of the cases in the sets using the direct calibration method

Institutional Change by Replacement

As mentioned in other sections, in fuzzy sets, each variable is treated as a set in which the cases are located according to their degree of membership. In order to create the corresponding sets, each variable will acquire the category of set, applying the direct method of calibration to obtain the degrees of membership of each case within the sets: Institutional Change by Replacement, Transgressive Contention, Anti Status Quo Leadership and Division of the Elite. For the case of the substitution set, three thresholds have been considered: 0.90 as a threshold for full membership; 0.50 as an intermediate point and 0.10 as the threshold for non-membership[13].

— Privatization of public services
— State intervention to guarantee primary education
— State intervention to guarantee housing
— State intervention to guarantee health coverage
— State intervention to guarantee college education
— State intervention to guarantee price control

For the calculation of the polarization we will consider the weighted polarization formula of Taylor and Herman (1971) and Knutsen (1998), taken from (Ruíz and Otero 2013):

$$Pp\ \sum_j^j = 1\ P_j^p \left(\tilde{X}_j - \bar{X}p\right)^2$$

Where:

Is the proportion of seats that each party obtains over the total of 17.

P_j is the ideological average of the party j

P_p is the weighted average by the proportion of seats over 1 of the positions of all the parties in that scale $(\bar{X}A.\ P_A^p) + (\bar{X}A.\ P_B^p) + \ldots$

The results of the application of the polarization formula of the selected variables in each case are expressed in the following polarization index.

[13] The application of the direct method involves the determination of three thresholds: the full membership threshold, the intermediate point and the non-membership threshold. From the determination of these three thresholds, one should calculate the associated probabilities and logarithms of probability that would correspond to each case within the set with respect to full membership and non-membership thresholds. The associated probabilities result from applying the formula: degree of membership/1-degree membership. The logarithms of probability are the natural logarithms of each of the associated probabilities.

TABLE 10
MEMBERSHIP THRESHOLDS, NON-MEMBERSHIP AND INTERMEDIATE POINTS ESTABLISHED FOR THE SET OF COUNTRIES WITH INSTITUTIONAL CHANGE BY REPLACEMENT

Label	Degree of Membership	Associated probabilities	Probability logarithms
Threshold of full membership	0.90	9	2.19
Intermediate Value	0.50	1	0
Non membership	0.10	0.11	-2.20

TABLE 11
DEGREE OF MEMBERSHIP OF CASES IN THE SET INSTITUTIONAL CHANGE BY REPLACEMENT

Country	Sum in replacement rates	Deviations from the intermediate value	Scales	Product	Degree of membership
Ecuador 2	46	22	0.099	2.19	0.99
Venezuela	40	16	0.099	1.59	0.97
Bolivia	34	10	0.099	0.99	0.90
Ecuador 1	24	0	0.18	0	0.50
México	23	-1	0.18	-0.18	0.39
Argentina	17	-7	0.18	-1.26	0.05

In the second column of Table 8, the summation result is expressed within the indexes of constitutional change and change in redistributive policy in all cases. The third column reflects the deviations of each of these values with respect to the intermediate point; in this case, the intermediate point has a value of 24. Thus, for example, if one considers the case of Ecuador 2, whose result in the sum is 46, the deviation that it presents with respect to the intermediate point is of 22 (46-24 = 22), the same criterion being applied for each of the cases.

The fourth column transforms the mean-point deviations into probability logarithms. The logarithm of probability (scale) corresponding to each of the cases that are above the midpoint is the quotient resulting from dividing the logarithm of probability of the full membership threshold by the deviation between the maximum value Membership and the value of the

intermediate point 2.19 / 48-24 = 0.099. The same procedure is applicable to determine the logarithm of probability of those cases that are below the midpoint. In this assumption, the dividend will be the logarithm of probability of the threshold of non-membership and the divisor is the deviation between the value of non-membership and the deviation of the intermediate point -2.19 / 12-24 = -0.18.

The fifth column is the product that results from multiplying the second and third columns. The degree of membership, reflected in the sixth column, results from the application of an exponential calculation formula in which the probability logarithms of each case are transformed into probabilities of belonging within a range of values from 0.0 to 1.00. The formula used for membership determination is: degree of membership=exp (logarithm of probability)/1+exp (probability logarithm)[14].

As can be seen, the highest membership value corresponds to the case of Ecuador 2 with a membership value of 0.99, followed by Venezuela with 0.97, and in third place Bolivia with 0.90. All three cases reveal high levels of membership, which would imply that replacement change in them was more evident according to the dimensions of institutional change that have been considered in this analysis.

The three cases have had a profound constitutional change, in which substantial aspects of the fundamental principles, and dogmatic and organic contents in their constitutions, were modified. These values also reveal that in all three cases there was a significant change in the ideological and programmatic orientations of its parliamentary elite with respect to policies of a redistributive nature and also registered higher levels of investment in social spending compared to the indexes registered in previous governments.

These changes occurred after the development of episodes of contest and the arrival of new characters to power. At the intermediate point is the case of Ecuador 1. This case represents the assumption of a new Constitution without there being substantial transformations within its contents with respect to those that were in force during the episode of the 1997 contest. Likewise, it denotes marginal changes in terms of ideological orientations, perceptions of elites and investments in social spending.

[14] The direct calibration method will also be used to calibrate the membership degrees of the three explanatory variables or sets: Transgressive Political Contest, Anti Status Quo Leadership, and Political Elite Division.

Calibration in the Set of Transgressive Contention

TABLE 12
MEMBERSHIP, NON-MEMBERSHIP, AND INTERMEDIATE POINT THRESHOLDS ESTABLISHED FOR THE SET OF COUNTRIES WITH TRANSGRESSIVE CONTENTION

Label	Degree of membership	Associated probabilities	Logarithms of probability
Threshold of full membership	0.95	9	2.94
Intermediate value	0.50	1	0
No membership	0.10	0.11	-2.20

TABLE 13
DEGREES OF MEMBERSHIP OF THE SET OF COUNTRIES THAT PRESENT TRANSGRESSIVE CONTENTION, CALIBRATED THROUGH THE DIRECT METHOD

Country	Sum in the scale of political contest	Deviations from the intermediate value	Scale	Product	Degree of membership
Argentina	12	6	0.49	2.94	1.00
Bolivia	12	6	0.49	2.94	1.00
Ecuador 2	11	5	0.49	2.45	0.99
México	10	4	0.49	1.96	0.98
Venezuela	10	4	0.49	1.96	0.98
Ecuador1	9	3	0.49	1.47	0.96

In the corresponding section, the criteria from which the intensity was evaluated in the development of the mechanisms were established: attribution of threat, dissemination of contention, radicalization and repression in each of the cases. According to the analysis, all assumptions have high membership values, higher than the value of 0.50 within the set of Transgressive Contention, with the most significant cases being Argentina and Bolivia. This would imply, in a preliminary approximation, that the Transgressive Contention has an important implication as a necessary condition within the institutional change by replacement. However, the attributes of necessity and sufficiency will be subject to the parameters of adjustment of consistency and coverage.

TABLE 14
MEMBERSHIP, NON-MEMBERSHIP, AND INTERMEDIATE POINT THRESHOLDS ESTABLISHED FOR THE SET OF COUNTRIES WITH ANTI-STATUS QUO LEADERSHIP

Label	Degree of membership	Associated probabilities	Probability logarithms
Threshold of full membership	0.95	9	2.94
Intermediate value	0.50	1	0
No membership	0.10	0.11	-2.20

TABLE 15
DEGREES OF MEMBERSHIP OF THE SET OF COUNTRIES THAT PRESENT LEADERSHIP WITH ANTI-STATUS QUO STRATEGY, CALIBRATED THROUGH THE DIRECT METHOD

Country	Sum in the scale of political contest	Deviations from the intermediate value	Scale	Product	Degree of membership
Venezuela	12	6	0.49	2.94	1.00
Ecuador 2	11	5	0.49	2.45	0.99
Bolivia	10	4	0.49	1.96	0.98
Argentina	2	-4	0.73	-2.92	0.01
México	0	-6	0.73	-4.38	0.0
Ecuador 1	0	-6	0.73	-4.38	0.0

In this group, high values of belonging are observed in three cases: Venezuela, Ecuador 2 and Bolivia. Preliminarily, this variable anticipates an explanation that ponders the presence of Anti-Status Quo Leadership as a likely sufficient condition. Subsequent sections will evaluate the consistency and coverage adjustment parameters with respect to their involvement as a sufficient condition in the production of the result of change by replacement.

TABLE 16
MEMBERSHIP, NON-MEMBERSHIP AND MAXIMUM AMBIGUITY POINT THRESHOLDS ESTABLISHED FOR THE SET OF COUNTRIES WITH DIVIDED ELITES

Label	Degree of membership	Associated probabilities	Probability logarithms
Threshold of full membership	0.95	9	2.94
Intermediate value	0.50	1	0
No membership	0.10	0.11	-2.20

TABLE 17
DEGREES OF MEMBERSHIP OF THE SET OF COUNTRIES WITH DIVIDED ELITES, CALIBRATED THROUGH THE DIRECT METHOD

Label	Sum in the scale of political contest	Deviations from the intermediate value	Scales	Product	Degree of membership
Bolivia	9	4	0.73	2.94	1.00
Ecuador 2	9	4	0.73	2.94	1.00
Ecuador 1	8	3	0.73	2.20	0.99
Venezuela	7	2	0.73	1.47	0.96
México	3	-2	0.73	-1.46	0.03
Argentina	3	-2	0.73	-1.46	0.03

The highest degree of membership corresponds to the cases of Bolivia and Ecuador 2, followed by the cases of Ecuador 1 and Venezuela. The cases that are practically outside the set of cases of Division of the Elite are Mexico and Argentina. These values corroborate the thesis that emphasizes the instability of the elites in the moments close to intense social crises and before the arrival of leaders with anti-status quo strategy (Dogan and Higley 1998; Ware 2004).

The cases of Ecuador corroborate the theses that point to Ecuador's political instability; derived from the weak institutionalization of the party system and which could be exacerbated by the higher levels of polarization in proportion to the other cases (Mainwaring & Torcal 2005; Sani & Sartori 1983). The case of Bolivia shows the rupture of the tripartite model and the empowerment of the MAS within the Assembly. Venezuela also has a high

membership value that reflects the instability within the Congress in the years prior to the arrival of Hugo Chavez. The cases of Mexico and Argentina, with lower values in proportion to the other cases, denote the roots of the traditional parties and the consolidation of stable parliamentary elite in spite of the crises that both countries faced within the periods considered in this work.

Analysis of the relations of necessity and sufficiency

The explanatory strength of each condition or causal configuration derives from the analysis of necessity and sufficiency. This potentiality is determined by consistency and coverage, parameters that, as already stated, result from arithmetic relationships between the membership values of the cases within each of the sets.

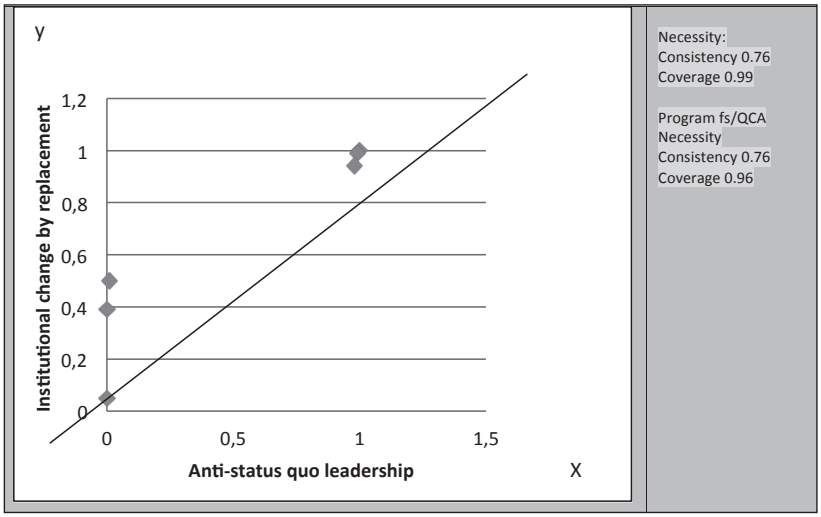
Table 18
THE ADJUSTMENT PARAMETERS ARE DETERMINED FROM THE FOLLOWING PROTOCOL

Protocol to evaluate consistency and coverage		
Types of sets		
Procedure	Cause (X) is a subset of result (Y) (**sufficiency)**	Result (Y) is a subset of the cause (X) (**necessity**)
Step 1	Evaluate consistency using: $\sum (\min(X_i, Y_i))/\sum X_i$	Evaluate consistency using $\sum (\min(X_i, Y_i))/\sum Y_i$
Step 2	If consistent, value coverage using $\sum (\min(X_i, Y_i))/\sum Y_i$	If consistent, value coverage using $\sum (\min(X_i, Y_i))/\sum X_i$

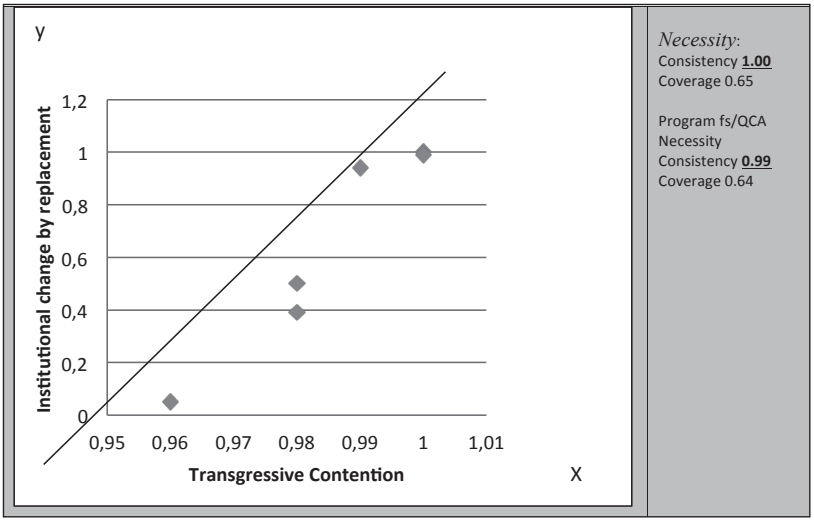
Source: Ragin (2008, p. 63)

The intersection between each of the conditions: Transgressive Contention, Anti Status Quo Leadership and Divided Elites, with respect to the dependent variable Institutional Change by Replacement, yields the following results in the implication of *necessity*.

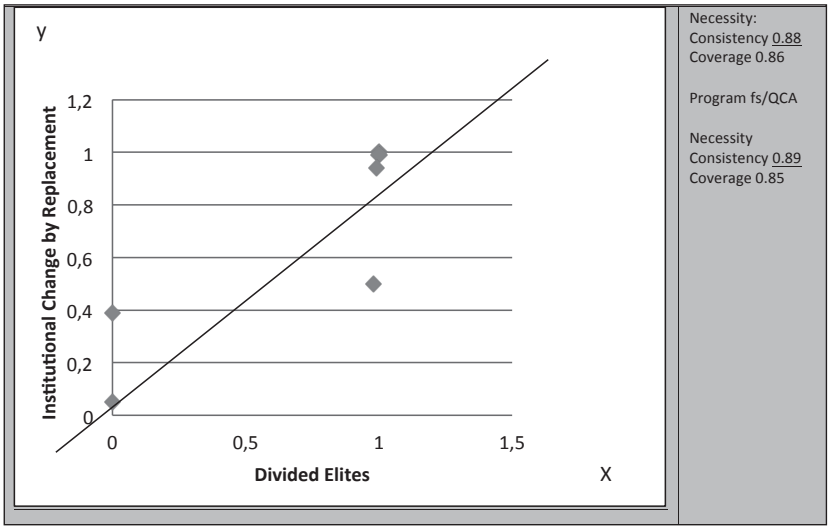
GRAPHIC 3
ANALYSIS OF THE NECESSITY OF THE LEADERSHIP
WITH ANTI-STATUS QUO STRATEGY CONDITION



GRAPHIC 4
ANALYSIS OF THE NECESSITY OF THE CONDITION
TRANSGRESSIVE CONTENTION



GRAPHIC 5
ANALYSIS OF THE NECESSITY OF THE CONDITION DIVIDE ELITES



The three graphs shown above reveal, in terms of necessity, the implication of each one of the variables with respect to the result. In the first figure, the variable Anti-Status Quo Leadership does not reveal an implication of important necessity since its consistency is 0.76. The variable of Transgressive Contention has strength in terms of necessity, with an almost perfect consistency of 0.99. The degree of consistency confirms the criterion that points to a greater implication of this variable as a necessary condition within the result of change by replacement. In the case of the Divided Elites variable, its implication as a necessary condition within the result is observed. However, it's measure of necessity consistency of 0.88 is lower than that for the variable, Transgressive Political Contest.

As this is a study with few cases, the configurations that are relevant to the result in terms of sufficiency will be evaluated through the truth table. The hypothetical combinations that derive from the intersection of conditions integrate the rows of the truth table. The corners of the property space from three configurations of causes (2^3) would express 8 logically possible configurations. Graphically they are expressed as follows[15]:

[15] C= Transgressive political contest; Q= Leadership with anti-status quo strategy; D= Divided elites.

The cases could be located at any of the corners of the vectors.

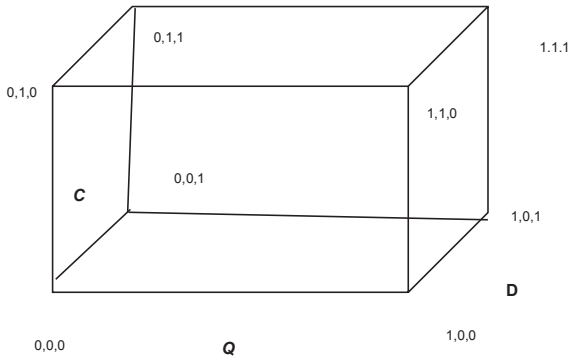


TABLE 19
TABLE OF TRUTH

Cases	Result	Conditions			Space of attributes/possible configurations / ideal types (2^3)							
	CR	C	Q	D	c*q*d	c*q*D	c*Q*d	c*Q*D	C*q*d	C*q*D	C*Q*d	C*Q*D
Ecuador 2	0.99	0.99	0.99	1.00	0	0.01	0	0.01	0	0,01	0	**0.99**
Venezuela	0.97	0.98	1.00	0.96	0	0	0.02	0.02	0	0	0.04	**0.96**
Bolivia	0.90	1.00	0.98	1.00	0	0	0	0	0	0.02	0	**0.98**
Ecuador 1	0.50	0.96	0.00	0.99	0.01	0.04	0.01	0.04	0.01	**0.96**	0	0
México	0.39	0.98	0.00	0.03	0	0.02	0	0	**0.97**	0.03	0	0
Argentina	0.05	1.00	0.01	0.03	0	0	0	0	**0.97**	0.03	0.01	0.01
Cases with values above 0,50					0	0	0	0	2	1	0	3
Cases with values above 0,50					0	0	0	0	0	0	0	3

CR= Change by replacement
C= Transgressive contention
Q= Anti-status quo leadership
D= Division of the elite
c= Negation of transgressive contention
q= Negation of anti-status quo leadership
d= Negation of elite division

The logical conjunction operator (*) at the intersection of three conditions, considers the lowest membership value between them.

The logical negation operator (~), at the intersection of the three variables, considers the calculation of membership. In the case of negation, it supposes the subtraction of the degree of membership of the value 1. Example: The value that would correspond to the negation or absence of anti-status quo leadership in the case of Bolivia is (1) — (0, 98) = 0.02.

The table of truth reveals the existence of a relevant configuration: C*Q*D

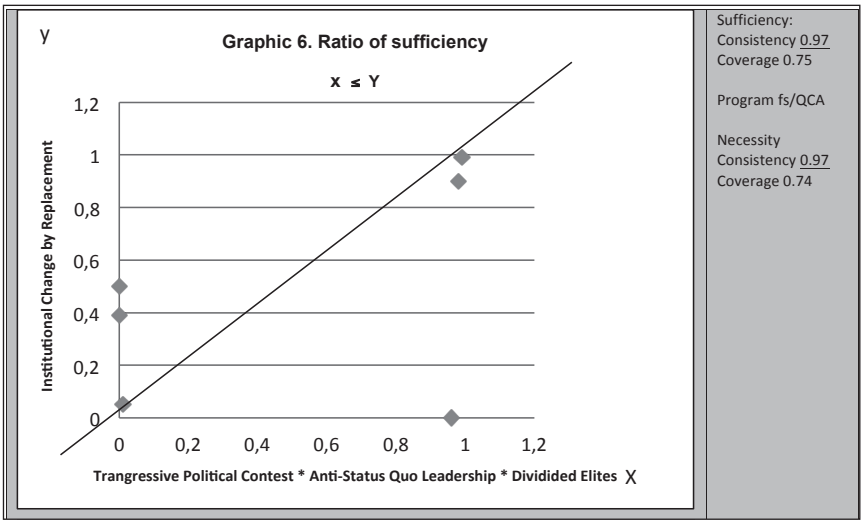
The values reflected in the table of truth show that the relevant configuration, in terms of sufficiency for the explanation of Institutional Change by Replacement, is integrated by the presence of the three conditions C*Q*D (Transgressive Contention* Anti-Status Quo Leadership * Divided Elites). The relevance of the configuration is showed by values greater than 0.50 within the rows. Likewise, this configuration corresponds to cases with values greater than 0.50 within the result, the frequency of the cases that present this configuration is 3 (Ecuador 2, Venezuela and Bolivia). These cases are those with the most significant membership values within the result of change by replacement.

The sufficiency test using the consistency and coverage parameters in the formula $(\sum (min(X_i, Y_i))/\sum X_i)$ yields the following results:

C*Q*D
Consistency: **0.97**
Coverage**: 0.75**

This sufficiency ratio is expressed in the following graphic.

GRAPHIC 6
RATIO OF SUFFICIENCY



The configuration C*q*D has a value of 0.96, higher than the threshold of 0.50, however, in contrast with the values corresponding to the result, it is

noticed that only one case presents this configuration: Ecuador 1, its values within the result correspond to the threshold of 0.50, the point of maximum ambiguity. This configuration does not hold up as relevant in its sufficiency implication with the result of Change by Replacement. The C*q*d configuration has values greater than 0.50, but the assumptions in which it is present are those cases that have membership values lower than 0.50 within the result of Change by Replacement; is it also not a relevant configuration in terms of sufficiency for the result.

Treatment of Counterfactual Assumptions

The table of truth also shows five counterfactual assumptions: (c*q*d/c*q*D/c*Q*d/c*Q*D/C*Q*d). QCA foresees the possibility of establishing, theoretically, the relevance or not of such configurations within the result. In order to approximate a hypothesis about the relevance of these configurations, the sufficiency relation of each condition will be analyzed individually with the result. The analysis will be conducted starting from the negation or absence and the importance that the assumption of negation has for the modification of the consistency and coverage values[16]. A presumption on the counterfactual assumptions would indicate the relevance, in terms of sufficiency, of the configurations in which the presence of the conditions Anti-Status Quo Leadership and Divided Elites is maintained.

In the case of the negation of the *Anti-Status Quo Leadership* condition, to which the fsQCA program assigns the symbol (~), the variations in the consistency and coverage values are as follows:

Table 20
VALUES FROM FSQCA PROGRAM

Assumptions of negation of Anti-Status Quo Leadership (~asq)	Consistency	Coverage
q*C*D	0.56	0.15
q*C	0.32	0.25
q*D	0.54	0.15
C*D	0.85	0.88
Q	0.32	0.25
C	0.64	0.99
D	0.85	0.89

[16] The analysis is made from the fsQCA program.

TABLE 21
VALUES FROM FSQCA PROGRAM

Assumptions of negation of divided elites (~ef)	Consistency	Coverage
Q*C*d	1.00	0.01
Q*C	0.96	0.74
Q*d	1.00	0,01
C*d	0.24	0.12
Q	0.96	0.75
C	0.64	0.99
D	0.24	0,12

TABLE 22
VALUES FROM FSQCA PROGRAM

Assumptions of negation of Transgressive Contention (~cpt)	Consistency	Coverage
Q*c*D	1.00	0.01
Q*c	1.00	0.01
c*D	1.00	0,03
C*D	0.97	0,75
C	1.00	0,03
Q	0.96	0.75
D	0.85	0.89

TABLE 23
VALUES FROM FSQCA PROGRAM

Negation Assumptions of the outcome of Institutional change by replacement (~cr)	Consistency	Coverage
Q*C*D	0,05	0.00
Q*C	0.05	0.00
Q*D	0,05	0,00
C*D	0.17	0,31
Q	0,05	0,00
C	0.37	1,00
D	0.17	0.31

The above assumptions show that the Anti-Status Quo Leadership condition is significant in terms of sufficiency for the production of the result. As is noted in all assumptions that have been theorized, when the condition is absent, there is a significant decrease in consistency.

In the case where the *Anti Status-Quo Leadership* is individually present, the consistency level is 0.96 and coverage is 0.75. Similarly, there is some significance in terms of necessity and sufficiency of the *Divided Elites* condition, but their absence does not significantly alter degrees of consistency, as does *Anti-Status Quo Leadership*.

In cases where Divided Elites appears individually, the consistency value is 0.85 and the coverage value is 0.89. These values are relatively significant and the value of both parameters reveals some implication of necessity and sufficiency with the outcome.

Finally, in the case of the variable *Transgressive Contention*, no changes are observed in the consistency values in the cases in which it appears absent, which reveals a practically null relationship of sufficiency with respect to the result. Nevertheless, its relevance in terms of necessity for the production of the result is reaffirmed.

In the cases of negation of the result, Institutional Change by Replacement (cr), the power of the *Anti-Status Quo Leadership* condition is reaffirmed in the production of the result. By principle, all assumptions of absence of the result show a low consistency, which confers a greater force to the configuration that explains the result from the presence of the three conditions *Transgressive Contention* Anti-Status Quo Leadership * Divided Elites*.

The levels that show the assumptions of negation of each of the variables or explanatory conditions, as well as of the result, approximate some criteria on the theoretical relevance that the counterfactuals of the truth table could have. The configuration c*Q*D could explain the result with significant levels of consistency in terms of sufficiency since the configuration is integrated by the presence of two conditions that have relevance to the result in terms of sufficiency, but not of necessity. According to the above, assuming that in the counterfactual assumptions the result is present, the fsQCA program reveals c*Q*D as relevant configuration, with a consistency of 0.96 and a coverage of 0.77. Theoretically, this configuration could be an alternative explanation pattern for the development of institutional change by replacement. An explanation in this sense would reaffirm the hypothesis of Dierz and Mayers (2007) and Ware (2004) regarding the presence of anti-establishment leaderships that transform the patterns of traditional competition and, consequently, the structure of elites.

CONCLUSIONS

The outcome of the analysis of causal configurations through fuzzy sets confirms the hypothesis that relates the variables: *Transgressive Contention, Anti-Status Quo Leadership* and *Divided Elites* with the development of Institutional Change by Replacement. As can be seen from the different assumptions of configurations, including those in which the negation is contemplated, the condition with greater explanatory power, in terms of sufficiency is the Anti-Status Quo Leadership variable. However, the confluence of the three variables strengthens their implication within the result.

The low values of consistency in terms of sufficiency of the *Transgressive Contention* condition would explain that social mobilization, even when it acquires contentious and transgressive forms, can be a necessary condition for transcendent institutional changes to occur. However, contentious social mobilization, by itself, is not a sufficient condition for such changes to take place. The potential of the conflict to influence in substantial political changes stems from factors linked to the functioning of the political elite and, more importantly, to the emergence of a leadership challenging of the status quo that transforms or collapses the traditional party system (Ware,2004, Dietz & Mayers, 2007).

As stated at the beginning, the aim of this paper is to show some of the bases and application of the causal configurations model from fuzzy QCA sets. For this purpose, a work linked to social movements and institutional change has been shown to evidence how the method contributes significantly to the comparative analysis of macro-structures and also, how from the conceptual formation, the method promotes the constant interaction between the theoretical assumptions and the empirical evidence that is obtained from the comparison of the cases.

Our research showed the explanatory potential of the configuration of a) the contentious politics, b) the anti-status quo leadership and c) the division of the elite to generate substantial political changes. However, we would like to emphasize the theoretical implications of the counterfactual analysis. As indicated in this study, a *relevant condition* for institutional change is the anti-status quo leadership. This assumption opens a new research agenda where leadership and discursive strategies will take an active role in the theoretical design on institutional change and in the potential for success of movements from the construction and strategies of their leaders.

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