

## Chapter 2

# What Is Protest? Concept and Measurement

### 2.1 Introduction

*What is political protest and how can it be measured?* This chapter discusses the concept of political protest, and provides an instrument to measure and to assess its cross-national measurement equivalence. As known, in the social sciences concepts have to “travel” to compare phenomena (Sartori 1970). It is thus necessary to make sure that the same concept represents the same latent construct in all the contexts analyzed. Gerring (1999, 366) argues that “concept formation is a highly contextual process” and so is measurement, as the two are intimately connected (Adcock and Collier 2001). This chapter aims to answer another question: *is the measure of political protest equivalent across countries?* The issue of measurement equivalence is not very much addressed in political science (Jackman 2008; Ariely and Davidov 2012; Stegmüller 2011), except for a few instances (see Van Deth 1998), in contrast with other social science disciplines, such as psychology (Van de Vijver and Tanzer 2004). The test of measurement equivalence represents an important stage of the research process, as it guarantees that the analysis of a phenomenon is well-founded (Jacoby 1999). In order to compare the levels of political protest across different contexts it is necessary to assess the equivalence of the measurement instrument gauging this latent concept, to ensure that what is actually measured has the same meaning in all the different contexts analyzed.

This chapter argues that the concept of political protest can be seen as made of one latent dimension. By relying on a consolidated research tradition, this chapter tests a measurement instrument that allows ascertaining the individual and country scores of political protest. Doing so, the index employed provides both an individual and an aggregate measure. After outlining the concept of political protest, the operationalization will follow “Political Action” (Barnes and Kaase 1979), a milestone in the field. The empirical analysis will show that the concept of political protest can be measured using five indicators: signing a petition, joining in boycotts,

attending lawful/peaceful demonstrations, joining unofficial strikes, and occupying buildings or factories.

The employed conceptualization originates from the work of Barnes and Kaase (1979), who created a distinction between “conventional” and “unconventional” participation, known as “protest politics”, “direct political action” or “protest behavior”. This distinction has been followed, among others, by Inglehart (1990), Parry et al. (1992), Inglehart and Welzel (2005), Norris (2002), Benson and Rochon (2004), Dalton (2008), Dalton et al. (2010) and Welzel and Deutsch (2012). The chapter also provides alternative operationalization strategies based on a different number of indicators and data sources. This is because cross-national equivalence may depend on which indicators are included in a summary index. The empirical strategy relies on Mokken Scale Analysis (Mokken 1971; Van Schuur 2003), that is a non-parametric scaling method of the family of Item Response Theory models that has been proven to work better than factor analysis when dealing with dichotomous items. The chapter will discuss what the advantages of this approach are and will provide a general strategy to test measurement equivalence in the field of political protest.

## 2.2 The Concept of Political Protest

To define the concept of political protest it is necessary to discuss the broader concept of political participation. Political participation can be loosely defined as the set of activities which aim to modify the current state of affairs. One of the first conceptualization of political participation is the one by Verba and Nie which had a great influence on the following literature on political action. They argued that political participation refers to “those activities by private citizens that are more or less directly aimed at influencing the selection of governmental personnel and/or the actions they take” (Verba and Nie 1972, 2). This definition mainly considered those actions undertaken to influence the government. However, Verba and Nie also enlarged the scope of activities that citizens could engage in (Teorell et al. 2007). Thus, the focus was no longer exclusively on institutional politics, e.g. the selection of the political personnel. Indeed, for a long time political participation was meant as an activity related to electoral behavior and to political recruitment. In fact, Verba and Nie, in their conceptualization, excluded other forms of political engagement, such as passive forms, civil disobedience or other forms of political violence (Conge 1988). Such conceptualization of political participation was due to the fact that until the end of the 1970s other modes of political engagement addressing different issues or targets were considered irrational or disruptive behaviors (Rucht 2007). Other scholars as well emphasized the institutional aspect of political participation, leaving alternative forms of engagement in the background (Milbrath and Goel 1977). In the following years, Verba and Nie’s definition started being too “narrow” to describe the recent developments of political engagement. Their definition cut out many forms of political participation and it restricted the scope of action to the

governmental arena. This is because, in this definition, an act is political as it is related to “the authoritative allocation of values for a society” (Easton 1965, 134).

It is quite correct to argue that the concept of political participation is mostly linked to the act of voting, but it should not only be considered as limited to the electoral sphere. Consequently, the conceptualization of political participation was enlarged to capture “new” forms of political action. The innovative “Political Action” (Barnes and Kaase 1979) introduced a very important distinction in the field, updating the idea of what political participation was. Indeed, “empirical research [had] not kept in pace the growing theoretical emphasis upon non institutionalized, non electoral political action, an emphasis that reflects the prominence of protest in the mass politics of Western democracies during the 1960s” (Kaase and Marsh 1979a, 27). This approach introduced a seminal distinction. On the one hand, political participation can be “conventional” and refers to all those acts belonging to the constitutional process of interest aggregation and representation, which are mediated by political institutions, and which define the relationship between political authorities and citizens within the political arena. On the other hand, political participation can be “unconventional”, which is non-institutionalized direct political action, that does not aim to disrupt or threaten the stability of liberal democracies. In this sense, unconventional political participation overlaps with “political protest”. In fact, “direct political action generally, and political protest in particular, do not necessarily assume anti-regime protests; rather, it may form one element of an expanded repertoire of political action” (Kaase and Marsh 1979a, 27), since “direct political action techniques do not in fact bear the stigma of deviancy. Nor are they seen as antisystem-directed orientation” (Kaase and Marsh 1979b, 157). Hence, political protest is considered “a means of political repress, namely [...] the use of tactics as petitions, demonstrations, boycotts, rent or tax strikes, unofficial industrial strikes, occupations of buildings, blocking of traffic, damage to property, and personal violence” (Marsh and Kaase 1979, 59).

Therefore, many studies following Barnes and Kaase’s seminal book (see Jennings et al. 1989; Parry et al. 1992; Inglehart 1997; Norris 2002; Van Deth et al. 2007; Dalton 2008; Dalton et al. 2010; Welzel and Deutsch 2012) started incorporating these forms in the *repertoire* of political participation to grasp its changes which otherwise would not have been perceived. As Norris has stated:

the analysis of protest politics shows that many of these forms of activity, such as petitions, demonstrations, and consumer boycott, are fairly pervasive and have become increasingly popular during recent decades. Protest politics is on the rise as a channel of political expression and mobilization (Norris 2002, 234).

The distinction between conventional and unconventional political participation introduced a key element: the object of political action. Conventional participation, as seen, aims to influence the political arena, and public institutions, while political protest can also target other objects that are not necessarily part of the political system. As Teorell et al. (2007, 336) argue: “‘the authoritative allocation of values’ is *not* the sole responsible of state actors of the public sector. As a result these non-governmental institutions may be targeted by citizen attempts to influence ‘political

outcomes””. The *repertoire* of unconventional political participation includes forms of action that do not intend to influence public or state actors only, but also private subjects that have public relevance and whose decisions may impact the general population and interest. For these reasons, unconventional actions are extra-representational and can be undertaken to influence both the public and the private sectors. A clear example can be the case of demonstrations. Very often they are means of opposition to governmental decisions, such as cuts to the welfare state sector, but they are also oriented to influence public opinion or private firms. It can be possible to recall the experience of the “anti-globalization movement” or the “global justice movement” (Della Porta et al. 2006; Della Porta 2007), which were critical of the neo-liberal economic turn, and that often concluded their gatherings with large demonstrations. In fact, as Della Porta and Diani (2006, 165) argue:

heterogeneous and initially loosely connected groups had mobilized together, mainly against international organizations, using different strategies: from lobbying to marches, from boycotts to petitions, from strikes to netstrikes [...] demonstrators from many countries challenged the legitimacy of the decisions of some international governmental organizations and sought to hinder their plans. They did not do so through normal diplomatic channels or through elections. Rather, they sought to influence public opinion in various ways.

The last element of political protest to be underlined is that the actions forming its *repertoire* can be considered hierarchically ordered (Van Deth 1986; Kaase 1989): “[t]he first threshold indicates the transition from conventional to unconventional politics. Signing petitions and participating in lawful demonstrations are unorthodox political activities but still within the bounds of accepted democratic norms. The second threshold represents the shift to direct action techniques, such as boycotts. A third level of political activities involves illegal, but nonviolent, acts. Unofficial strikes or a peaceful occupation of a building typify this step. Finally, a fourth threshold includes violent activities such as personal injury or physical damage” (Dalton 1988, 65).

To conclude, “political protest” or “unconventional participation” can be understood as a direct form of political participation taking place without the intermediation of institutional actors. Protest may arise from social organizations that vary in structures, memberships, scopes, resources and capacity of mobilizations (Della Porta and Diani 2006). Political action must be free and organized by civil society, not by governmental institutions looking for the support of the population. As a form of direct participation, protest requires an extended effort and a certain degree of conflict. Potentially, it produces high pressure on the contested actors, although it may not produce the expected outcome. Protest may also presuppose collective action (Tilly and Tarrow 2006), but not necessarily. Unconventional political actions are not professional activities and they must be voluntary, and participants are ordinary citizens. In order to be defined “political” an unconventional action has to have a target. The action must aim to influence the existing reality, either governmental institutions or actors belonging to the private sector (Teorell et al. 2007).

## 2.3 The Measurement of Political Protest

At this point, *what is the strategy to measure political protest?* Following Marsh (1974), a good strategy could be using stimuli to measure the intention to participate in petitions, demonstrations, boycotts, strikes, occupations, or blockades, or intention to refuse to pay the rent and taxes, to paint slogans, or to damage property (see Van Deth 1986, 2014). This series of items allows measuring the “protest potential”, that is the extent to which an individual would join protest actions. This strategy was also used in “Political Action” (Barnes and Kaase 1979), where the authors included a number of items measuring participation in forms of political action, such as demonstrations, boycotts, petitions, strikes and occupations, and therefore follow the approach outlined by Marsh. Unfortunately, the equivalence of this scale across a large number of countries has yet to be provided, while a previous study was proposed by Van Deth (1986) using a set of eight Western democracies. Several comparative studies have applied this scale to very different contexts, which not only have different cultures, but also different historical legacies, modes of democratization and, consequently, patterns of political engagement.

Previous studies provide some evidence of the internal reliability of the scale, but they do not focus on its measurement equivalence. For instance, Norris (2002, 195–196) elaborates a scale of “protest activism” using five items included in the World Value Survey arguing that these form a distinct dimension of engagement, different from other forms of political and social involvement, such as voting and being member of a number of organizations. In support of this argument a principal component factor analysis is provided. The results are clear but the analysis is run on the pooled sample without taking into account country heterogeneity. Benson and Rochon (2004, 441–442) use Guttman scaling to assess the reliability of the political protest scale, but they do not concentrate on its cross-country equivalence. Dalton (2004, 177), analyzing the correlation between political trust and the political protest scale, treats the latter as the sum of five political activities. Similarly, Dalton et al. (2010, 61) use the same scale providing a principal component analysis and emphasizing the fact that just one factor emerges with an eigenvalue greater than one. These are influential studies that have used measures of political protest according to the work of Barnes and Kaase. The missing point is that, despite their important comparative contribution, these studies do not tackle the issue concerning the assessment of the cross-country measurement equivalence of the scales they use.

The next sections illustrate the potential problems arising from the lack of measurement equivalence in comparative research and outline an empirical strategy to assess it.

## 2.4 The Importance of Measurement Equivalence

In comparative studies researchers use a number of cases to draw inferences and test their theories. Among others, two elements constitute fundamental aspects of comparative research: concepts and measures. On the one hand, concepts define the phenomena under study. Sartori (1970) warned that a potential risk for the validity of a study, particularly relevant in comparative politics, is the problem of “conceptual stretching”. In fact, it is not uncommon that comparative research is impaired by the use of concepts that are not meaningfully applicable to different contexts. On the other hand, comparative researchers build measures that should be comparable across the contexts they study. Concept formation and measurement are two steps strictly intertwined (Adcock and Collier 2001).

Defining concepts to be used in comparative designs is a necessary stage to construct empirical measures, i.e. to operationalize them. As this stage is passed, the comparative researcher faces another problem: assessing measurement equivalence. As with concepts, measures should also be valid across the different contexts in which they are used. This means that *measures have to measure* the same “object” across different contexts. Cross-national research has developed steadily over the last decades thanks to international survey projects (Norris 2009), but the attention paid to the assessment of the cross-national equivalence of measurement instruments has been scarce, especially in the field of political science (Jacoby 1999; Adcock and Collier 2001; King et al. 2004; Jackman 2008; Ariely and Davidov 2012). As Adcock and Collier (2001, 534) argue: “this concern with context can arise when scholars are making comparisons across different world regions or distinct historical periods [...] the potential difficulty that context poses for valid measurement [...] deserves more attention in political science”. Further, the process of measure validation in comparative research is linked to theory testing (King et al. 1994; Jacoby 1999), probably the final goal of scientific research, as without reliable instruments it is not possible to provide reliable results and to draw inferences from the cases under study.

When several contexts are taken into account it is important to make sure that the measurement instruments used are able to “capture” the underlying latent construct that has to be measured (Jackman 2008). The operationalization process in comparative research requires the recognition that concepts have a “contextual specificity” (Adcock and Collier 2001, 529–530). Unfortunately, this is not sufficient to construct valid measures. Dismissing the importance of measurement equivalence may have consequences on the validity of a comparative study. First, the conclusions drawn from a study using a measurement instrument that has not been tested cannot be taken for granted (Steenkamp and Baumgartner 1998). Second, if the measurement instrument is not valid across contexts the relationships between this measure and other variables may be questioned. Therefore, this step of the research process is necessary for both descriptive and causal inference (Adcock and Collier 2001). In brief, it is important to assess whether the measurement instrument that will be used works similarly across the contexts under study (Steenkamp

and Baumgartner 1998; Vandenberg and Lance 2000). The structure of the latent construct must be the same in all the contexts to which the measurement instrument is applied.

Thus, the assessment of cross-country measurement equivalence should be a central concern for researchers willing to test hypotheses and theories in different contexts (Billiet 2003). If researchers want to meaningfully compare the same concept in different contexts they must be sure that the measure representing its underlying latent trait is cross-nationally comparable to avoid any potential bias in analyzing a phenomenon.

## 2.5 How to Assess Equivalence?

Measurement equivalence implies the concepts of validity and reliability. Bollen (1989, 184) conceptualizes validity as an issue “concerned with whether a variable measures what it is supposed to measure”. Concerning reliability, Adcock and Collier (2001, 531) argue that “[r]andom error, which occurs when repeated applications of a given measurement procedure yield inconsistent results, is conventionally labeled a problem of reliability”. Measurement equivalence can be defined as “whether or not, under different conditions of observing and studying phenomena, measurement operations yield measures of the same attribute” (Horn and McArdle 1992, 117). This means that the measure is reliable and valid.

In Classical Test Theory measurement equivalence has three different levels (Steenkamp and Baumgartner 1998; Vandenberg and Lance 2000).<sup>1</sup> The first level of equivalence is “configural invariance”. It mainly refers to the structure of the factor loadings, and practically means that in all contexts the latent construct shows the same configuration of factor loadings. The second level of measurement equivalence is “metric invariance”. This type of equivalence requires that all factor loadings measuring the strength of the relationship between the items and the construct are equal across the contexts. The last level of measurement equivalence is “scalar invariance” which is necessary to compare the mean of the construct across contexts. However, Classical Test Theory has been criticized for some assumptions that cannot, in most cases, be met. In particular, it assumes that the items measuring a latent trait are parallel, that is, they have similar means and standard deviations. Further, it does not take into account how respondents answer the items and, therefore, does not consider their “easiness” or “difficulty”, or their “popularity” or “unpopularity”. Table 2.1 illustrates an example using some fictitious items, which are ordered, forming a scale in which the respondents answering positively to more difficult items also answer positively to easier items.<sup>2</sup> According to this criticism, Classical Test Theory is not able to capture this feature, especially when

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<sup>1</sup>The standard technique is multi-group factor analysis (Bollen 1989).

<sup>2</sup>Van Schuur (2003) uses this example, with six items, to introduce Mokken Scale Analysis.

**Table 2.1** Example of a perfect Guttman scale

Response pattern	Items difficulty				
	Low				High
	Item 1	Item 2	Item 3	Item 4	
1	0	0	0	0	0
2	1	0	0	0	0
3	1	1	0	0	0
4	1	1	1	0	0
5	1	1	1	1	0
6	1	1	1	1	1

*Note:* adapted from Van Schuur (2003)

dealing with dichotomous or ordinal items (Sijtsma and Molenaar 2002; Van Schuur 2003). The nature of a scale has relevant theoretical implications, as each category represents cumulative “steps” formed by items that do not have the same probability of being chosen by respondents.

Since Classical Test Theory presents these problems, Mokken Scale Analysis can be used, that is a technique belonging to the framework of Item Response Theory (Mokken 1971; Sijtsma and Molenaar 2002; Van Schuur 2003) – a development of the Guttman scale (Guttman 1945). This technique has some assumptions. The first concerns the unidimensionality of the latent trait. The second regards the monotonicity of the Item Response Function, meaning that as the probability of a positive answer to an item increases, e.g. participation to a lawful demonstration, the latent score, e.g. the index of political protest, also increases. The third is that the respondents are locally independent. This means that the responses to some items depend from individual “ability”, defined by the latent trait, and not by other individual or items’ characteristics (Van Schuur 2003, 145). It follows that when a set of items form a Mokken Scale the simple sum score can be used as the latent trait score (Mokken 1971).

Mokken Scale Analysis has several advantages over covariance-based measurement models. It allows the researcher to determine the probability that a respondent has answered positively to an item conditional on other items. For instance, the probability that a respondent has attended a demonstration should be higher if he or she has signed a petition. Mokken Scale Analysis is a probabilistic technique and not a deterministic one. Guttman scaling assumes that a respondent has to follow a precise pattern of answers: a respondent answering positively to a difficult item also answers positively to a less difficult item. Mokken Scale Analysis, instead, accounts for the possibility that a respondent will not follow the hypothetical hierarchy of items. It detects the items that do not conform to a cumulative scale and drops them through an iterative pairwise process. In fact, Mokken Scale Analysis uses a clustering procedure made up of the following steps: it finds the pair of items with the highest scalability coefficient; it finds the next best item in the scale and repeats step one for all the items. It requires items forming the scale to be sufficiently homogeneous among themselves. This makes the measurement instrument more



reliable. It can, eventually, be used as a confirmatory test that a set of items form a unidimensional and cumulative scale across different populations.

The homogeneity of the scale is tested in order to check whether the scale measures one latent trait and whether the items can be combined. Two coefficients provide an answer.  $H$  is the scalability coefficient for the overall scale and it is defined as follows:

$$H = \frac{\sum_{i=j+1}^k \sum_{j=1}^{k-1} cov(X_i, X_j)}{\sum_{i=j+1}^k \sum_{j=1}^{k-1} cov(X_i, X_j)_{max}} \quad (2.1)$$

This coefficient is the ratio between the sum of the all pairwise covariances, those of the items, and the sum of all pairwise maximal covariances (Van Schuur 2003). If  $0.3 \leq H < 0.4$ , the scale is considered “weak”; if  $0.4 \leq H < 0.5$ , the scale is considered “moderate”; while if  $H \geq 0.5$ , the scale is considered “strong” (Mokken 1971). When the coefficient is equal to one, the scale is a perfect Guttman scale, meaning that all respondents follow a hierarchical pattern in answering items.

The second coefficient is  $H_i$ , that measures the scalability of the single items and is defined as follows:

$$H_i = \frac{\sum_{i=j+1, j \neq i}^k \sum_{j=1}^{k-1} cov(X_i, X_j)}{\sum_{i=j+1, j \neq i}^k \sum_{j=1}^{k-1} cov(X_i, X_j)_{max}} \quad (2.2)$$

Like the previous coefficient, it should be  $\geq 0.3$ . Both coefficients are based on Loevinger’s coefficient that defines the homogeneity of a pair of items as  $H_{ij} = 1 - E(obs)/E(exp)$  (Van Schuur 2003). Eventually, another coefficient,  $\rho$ , provides a measure of reliability of the scale (Sijtsma and Molenaar 1987). Then, item ordering (Sijtsma et al. 2011) is evaluated to assess whether or not respondents follow, on average, the same response pattern in the analyzed countries.

## 2.6 Building an Index of Political Protest Using Survey Data

The source used to build an index of political protest is survey data. Among several comparative survey projects, the European Values Study (2011) contains five items measuring participation in forms of protest politics, that well fit to this purpose. As already mentioned, previous studies have suggested selecting similar countries when studying political participation, since in recently democratized countries or in countries with a shorter democratic history the patterns and the extent to which several modes of participation are used are very different compared with consolidated democracies (Teorell et al. 2007). Of course, another possibility could be taking into account a larger number of contexts with very different characteristics, as other publications have done (Norris 2002; Dalton et al. 2010). Yet, it may be argued that the chances of bias in such analytical settings are very high since

fully consolidated democracies and still-developing democracies present different modes of civic and political engagement. Furthermore, the levels of development and democratization have a significant effect on political protest (Dalton et al. 2010). In addition, limiting the scope of the analysis to a homogeneous area may increase the chances of finding measurement equivalence in the index of political protest.

The question wording of the items measuring participation in forms of political protest in the questionnaire of the European Values Study is as follows:

Now I'd like you to look at this card. I'm going to read out some different forms of political action that people can take, and I'd like you to tell me, for each one, whether you have actually done any of these things, whether you would/might do it or would not/never, under any circumstances, do it/any of them:

- Signed a petition
- Joining in boycotts
- Attending lawful/peaceful demonstrations
- Joining unofficial strikes
- Occupying buildings or factories

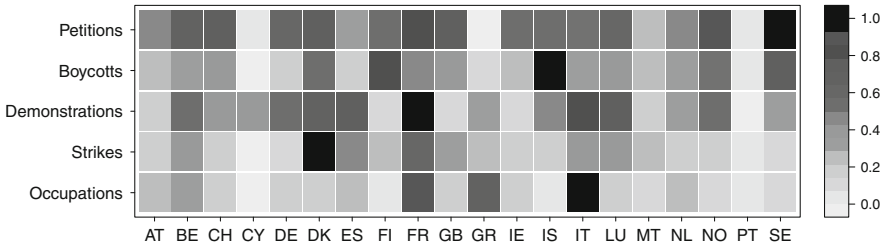
The original coding scheme assigns a score of “three” to those who would never carry out the political action, “two” to those who might, and “one” to those who have carried out the political action. The items have been recoded reversing the scale and assigning a “zero” to those who would never carry out and might carry out the actions, and “one” to those who have carried out the political actions. The index aims to measure only actual political protest, not potential one (Marsh and Kaase 1979, 59). Table 2.2 presents the mean scores and standard deviations for each country for the forms of political action used in the analysis and Fig. 2.1 illustrates the mean scores graphically to ease case comparison.<sup>3</sup> Table 2.2 shows that the means and the standard deviations are not similar between the items in the pooled sample and in the separate countries samples. Further, it should be noted that “signing a petition” is a form of action used frequently in Northern and Continental European countries. The highest mean score is present in Sweden, where about 80 % of the sample has signed a petition. Also Norway and Denmark have high levels of petitioning. In Continental Europe, France and Germany score quite high. In Southern European countries this mode of action is less popular compared to other contexts. In Malta, Portugal, Cyprus and Greece there are the lowest scores. As far as “joining in boycotts” is concerned, the same pattern is present in the selected countries. Iceland and Finland have the highest scores, while in Southern Europe this form of action is less popular. “Attending a lawful demonstration” is, instead, a more common form of political action. France, Italy and the Nordic countries are those where this form of action is more frequent. It is instead less frequent in Portugal, Great Britain and Ireland. With regard to “joining unofficial strikes”, in France and Denmark there is the highest percentage of respondents who have done this action. Conversely, the

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<sup>3</sup>Items are ordered as in the European Values Survey questionnaire. In Fig. 2.1 the items are rescaled to range between zero and one. Lighter and darker colors indicate, respectively, lower and higher scores.

**Table 2.2** The means and the standard deviations of the items for each country and for the pooled sample

Country	Petitions		Boycotts		Demonstrations		Strikes		Occupations	
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD
AT	0.49	0.50	0.09	0.29	0.16	0.37	0.04	0.21	0.02	0.16
BE	0.61	0.49	0.11	0.31	0.30	0.46	0.07	0.26	0.04	0.19
CH	0.66	0.48	0.14	0.35	0.25	0.43	0.04	0.19	0.02	0.15
CY	0.19	0.40	0.03	0.17	0.25	0.43	0.00	0.07	0.00	0.06
DE	0.57	0.49	0.09	0.28	0.30	0.46	0.03	0.16	0.02	0.14
DK	0.67	0.47	0.19	0.39	0.34	0.47	0.19	0.39	0.02	0.14
ES	0.39	0.49	0.07	0.25	0.37	0.48	0.09	0.28	0.03	0.16
FI	0.54	0.50	0.25	0.43	0.15	0.36	0.05	0.22	0.01	0.08
FR	0.68	0.47	0.16	0.36	0.45	0.50	0.12	0.32	0.09	0.28
GB	0.66	0.47	0.13	0.34	0.15	0.35	0.07	0.25	0.02	0.14
GR	0.19	0.39	0.07	0.25	0.23	0.42	0.05	0.21	0.07	0.25
IE	0.54	0.50	0.11	0.31	0.16	0.36	0.04	0.19	0.02	0.14
IS	0.54	0.50	0.31	0.46	0.27	0.44	0.04	0.19	0.00	0.07
IT	0.51	0.50	0.13	0.33	0.38	0.49	0.08	0.27	0.10	0.30
LU	0.59	0.49	0.13	0.34	0.36	0.48	0.08	0.27	0.02	0.14
MT	0.35	0.48	0.09	0.29	0.17	0.38	0.05	0.21	0.01	0.12
NL	0.50	0.50	0.11	0.31	0.22	0.41	0.04	0.19	0.02	0.16
NO	0.74	0.44	0.18	0.38	0.30	0.46	0.04	0.19	0.01	0.12
PT	0.21	0.41	0.05	0.21	0.12	0.32	0.02	0.13	0.01	0.08
SE	0.81	0.39	0.23	0.42	0.22	0.42	0.02	0.15	0.01	0.10
Pooled	0.52	0.50	0.13	0.33	0.26	0.44	0.06	0.24	0.03	0.17



**Fig. 2.1** Heatmap of the means of the items measuring political protest in Western European countries

lowest amount of participants in this action is found in Cyprus, Portugal, Germany and Sweden. The last form of political action, “occupying buildings or factories”, is most frequent in France and Italy, while in Cyprus and Iceland it is the least common form of action. The table also shows that the items are not parallel, indicating that using Mokken Scale Analysis is an appropriate choice.

In addition to the items present in the European Values Study, items included in two other surveys will be used. The first is the International Social Survey Pro-

gramme (2007), while the second is the European Social Survey (2011). These two surveys are used in a second stage of the search for measurement equivalence. This is because these two surveys include a fewer number of items measuring participation in political protest. The use of multiple surveys will provide a general overview of the differences in the scale of political protest. In fact, often scales may change when the source used, i.e. the survey, does not contain identical items, which may have, for instance, different question wording or have different response categories.

2.7 An Index of Political Protest in Western Europe

This section aims to address the following question: *is the index of political protest equivalent across Western European countries?* Table 2.3 shows the *H* coefficients for each country and for the pooled sample. The coefficient for the pooled sample is about 0.57, indicating that when country heterogeneity is not taken into account the items can be summed up in a scale. The scale can be considered a “strong” scale and it could be obtained by summing the items scores to form an index measuring the propensity to engage in protest politics. However, it is important to look at the coefficients for each separate country, in order to make sure the scale can be built in all the contexts analyzed. In almost all the cases the coefficients are higher than 0.5, which represents the threshold for considering the scale “strong”. The coefficients

**Table 2.3** *H* coefficients, standard errors, *Z* statistics and  $\rho$  for each country and for the pooled sample

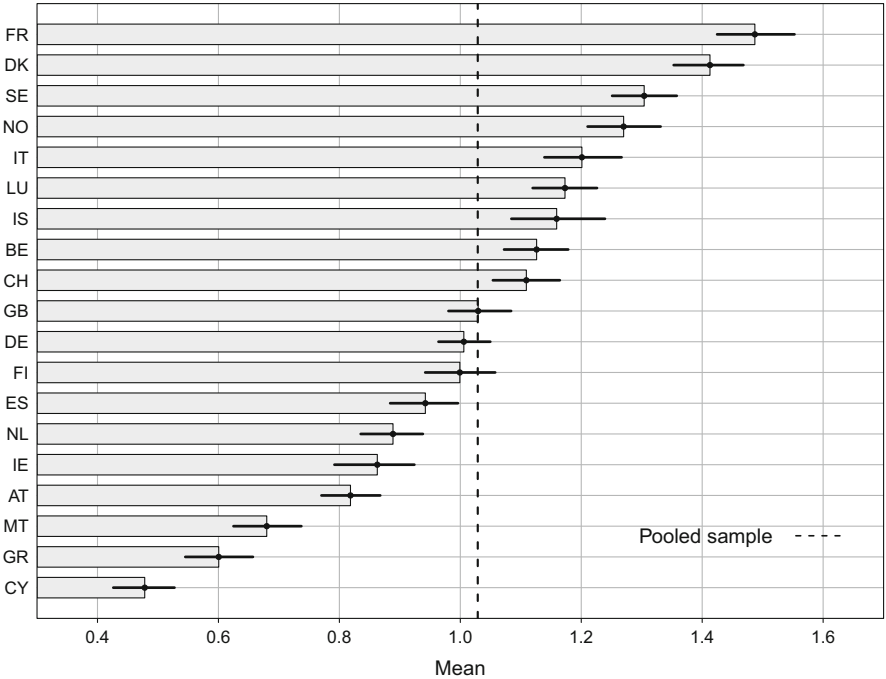
Country	<i>H</i>	s.e.	<i>Z</i>	$\rho$
AT	0.61	0.03	29.24	0.69
BE	0.53	0.03	25.67	0.65
CH	0.59	0.03	22.84	0.64
CY	0.57	0.04	18.98	0.67
DE	0.65	0.02	30.15	0.66
DK	0.42	0.02	23.88	0.58
ES	0.58	0.02	32.93	0.71
FI	0.51	0.03	19.79	0.61
FR	0.58	0.02	33.01	0.72
GB	0.58	0.03	28.18	0.69
GR	0.53	0.03	39.10	0.74
IE	0.68	0.04	24.98	0.72
IS	0.57	0.03	21.11	0.68
IT	0.55	0.02	34.88	0.71
LU	0.56	0.02	27.32	0.65
MT	0.66	0.03	34.66	0.73
NL	0.59	0.03	27.87	0.66
NO	0.55	0.03	18.03	0.59
PT	0.53	0.04	26.23	0.68
SE	0.54	0.04	19.06	0.65
Pooled	0.57	0.01	121.95	0.66

**Table 2.4**  $H_i$  and  $Z$  coefficients of the five items for each country and for the pooled sample

Country	Petitions		Boycotts		Demonstrations		Strikes		Occupations	
	$H_i$	$Z$	$H_i$	$Z$	$H_i$	$Z$	$H_i$	$Z$	$H_i$	$Z$
AT	0.73	17.52	0.58	21.69	0.63	22.91	0.54	17.91	0.49	13.66
BE	0.63	15.63	0.48	17.44	0.61	20.97	0.43	14.95	0.43	12.09
CH	0.64	12.36	0.56	17.15	0.63	19.25	0.58	13.99	0.48	10.26
CY	0.58	17.34	0.55	9.35	0.59	17.29	0.39	4.73	0.29	3.36
DE	0.66	19.61	0.65	20.75	0.66	23.70	0.58	16.11	0.70	18.50
DK	0.53	14.46	0.38	17.09	0.49	20.32	0.31	13.91	0.45	7.53
ES	0.54	22.37	0.59	20.72	0.58	24.80	0.59	21.19	0.65	15.80
FI	0.66	15.44	0.51	16.22	0.47	14.51	0.30	6.88	0.56	6.15
FR	0.75	21.30	0.48	19.66	0.70	25.58	0.46	18.87	0.50	18.52
GB	0.83	15.13	0.56	23.03	0.57	23.14	0.41	14.73	0.63	14.05
GR	0.56	27.40	0.48	23.80	0.64	29.93	0.52	22.68	0.39	19.14
IE	0.84	14.92	0.63	18.63	0.68	19.70	0.62	15.15	0.59	11.85
IS	0.63	15.17	0.54	16.97	0.56	17.32	0.56	7.60	0.74	5.05
IT	0.60	21.74	0.52	22.52	0.63	26.17	0.50	20.20	0.47	20.16
LU	0.62	18.38	0.52	18.54	0.63	23.19	0.46	14.90	0.41	8.29
MT	0.69	22.22	0.72	28.31	0.65	26.47	0.54	18.36	0.59	13.24
NL	0.73	19.54	0.57	20.38	0.61	22.17	0.37	10.79	0.52	13.74
NO	0.73	11.98	0.49	13.52	0.58	16.27	0.30	5.68	0.45	6.37
PT	0.63	21.92	0.52	18.08	0.60	23.61	0.24	6.78	0.12	2.32
SE	0.63	8.28	0.54	17.80	0.51	16.59	0.44	7.28	0.67	9.04
Pooled	0.66	80.18	0.53	85.55	0.60	96.61	0.47	65.62	0.49	55.23

are highest in Malta, Ireland and Germany, and lowest in Denmark. The third and the fourth columns of Table 2.3 report the standard errors of the coefficients and the  $Z$  statistics, which indicate that the coefficients are statistically different from zero. Furthermore, the last column, reporting the  $\rho$  coefficients, indicates that the scale is reliable. If the cross-national equivalence analysis of the political protest scale were to be stopped here, it would be accepted, as the  $H$  coefficients are high in all the countries. However, the  $H$  coefficient only measures the homogeneity of the scale and the distance from a perfect Guttman scale. Therefore, in order to further assess the cross-national equivalence of the scale, it is important to take into account the  $H$  coefficients for the items.

Table 2.4 reports the  $H$  coefficients of the items in each country analyzed. In almost all cases these coefficients are abundantly  $\geq 0.30$  and are statistically different from zero. Cyprus presents an  $H$  coefficient for the item “strikes” that is below the suggested threshold. Nevertheless, such borderline coefficient could be still considered “weak” (see Sijtsma et al. 2011), and the item could be kept in the scale. Conversely, the Portuguese sample violates twice the rule of thumb about the  $H$  coefficients of the items, therefore suggesting to remove the items “strikes” and “occupations” from the scale. This means that a scale of political protest cannot be built for Portugal using the five items.



**Fig. 2.2** The means of the index of political protest in Western European countries, with 95 % confidence intervals

According to the analysis of the  $H$  coefficients of the scale and the  $H$  coefficients of the items, to meaningfully compare the sum scores of the political protest scale Portugal should be excluded, as for this country the items do not meet the requirements of a Mokken scale. Therefore, this scale can be considered equivalent across nineteen out of twenty countries. As it seems that a unidimensional construct measuring the underlying concept of political protest is present, and as it appears that its cross-national equivalence for a certain number of cases holds, an additive scale is produced. The individual scores on each item are summed to obtain the overall index of political protest. The index ranges from zero to five, where zero represents an individual who has never engaged nor thought of engaging in any of the five forms of unconventional political participation and five represents an individual who has engaged in all of the forms. This scale may be used similarly across countries if its ordering is not taken into account.<sup>4</sup>

Figure 2.2 shows the mean point estimates with 95 % confidence intervals for the comparable countries. The vertical line indicates the mean of the pooled sample. Within the set of countries where the items form a homogeneous scale, there

<sup>4</sup>An example of such cross-national equivalence of a Mokken scale is provided in Van der Meer et al. (2009).

is a substantial amount of variation. The mean of the pooled sample is about one and countries can be broadly classified in three groups. There is a quite low unconventional participation group of countries composed by Cyprus, Greece, Malta, and Austria. Then, the group of average countries with mean scores that are close to the pooled sample average: Spain, Finland, Germany, Great Britain, Switzerland, Belgium, Iceland, Luxembourg, and Italy. Eventually, four countries, Norway, Sweden Denmark, and France, show mean scores highly above the average.

The second step of the analysis tests whether the item ordering is the same in the different samples so that it can be possible to say, for instance, that a respondent scoring two in France has engaged in the same actions as a respondent scoring two in Italy. To further explore the cross-country equivalence of the index of political protest, the analysis should check how the items are ordered in the country samples in order to assess whether the points of the index have the same meaning in different contexts. Table 2.5 shows how the items are ordered across Western European countries.

**Table 2.5** Ordering of the items forming the index of political protest for each country and for the pooled sample

Country	Ordering				
	1st	2nd	3rd	4th	5th
AT	P	D	B	S	O
BE	P	D	B	S	O
CH	P	D	B	S	O
CY	D	P	B	S	O
DE	P	D	B	S	O
DK	P	D	S	B	O
ES	P	D	S	B	O
FI	P	B	D	S	O
FR	P	D	B	S	O
GB	P	D	B	S	O
GR	D	P	B	O	S
IE	P	D	B	S	O
IS	P	B	D	S	O
IT	P	D	B	O	S
LU	P	D	B	S	O
MT	P	D	B	S	O
NL	P	D	B	S	O
NO	P	D	B	S	O
PT	P	D	B	S	O
SE	P	B	D	S	O
Pooled	P	D	B	S	O

*Note:* P = Signed a petition; B = Joining in boycotts; D = Attending lawful demonstrations; S = Joining unofficial strikes; O = Occupying buildings or factories

In most cases, the item ordering is the same as in the pooled sample. Five patterns describing different items orderings emerge from the data. However, to use the scale as an ordinal one and compare it across countries, only those countries showing the same item ordering should be used. The countries that may be compared using a five-item scale with six points, with an ordering equal to (1) petitions, (2) demonstrations, (3) boycotts, (4) strikes, and (5) occupations, are Austria, Belgium, France, Germany, Great Britain, Ireland, Luxembourg, Malta, the Netherlands, Norway, and Switzerland. Finland, Iceland and Sweden can also be compared, but follow a different item ordering. Denmark, Greece, and Italy cannot be compared with the other cases since they all present unique item orderings.

Focusing only on the comparable countries, the levels of political protest in the pooled sample and in the country samples can now be addressed. Without taking into account country heterogeneity, it can be argued that those who have never participated in political protest, nor thought of participating, are about 37 % of the sample. Those who signed a petition are about 34 %, those who attended lawful demonstrations and signed a petition are about 17 %, the percentage of respondent who also boycotted products is about 8, while those who joined unofficial strikes and occupied factories or buildings, in addition to doing the other forms of protest, are, respectively, 2 % and almost 1 %. Figure 2.3 shows the distribution for the separate countries. The highest percentage of respondents who are not active is in Malta (61 %) while the lowest is in Norway (23 %). Those who only signed a petitions are the most in Great Britain and Norway, while fewer in Malta and France. The percentage of respondents who also attended demonstrations is higher in France

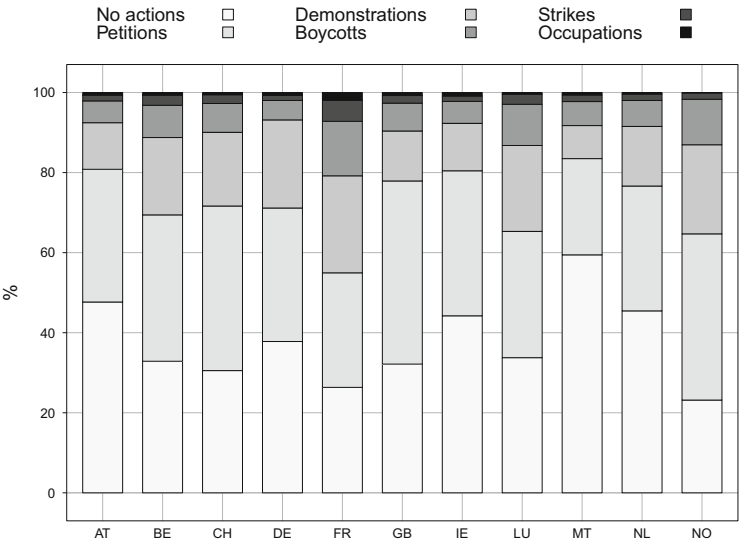


Fig. 2.3 The distribution of the index of political protest in the comparable countries



and Germany, while lower, in Malta and Ireland. Those who also engaged in strikes and occupations are more numerous in France, while fewer in Germany and Malta.

## 2.8 Alternative Measures

As the comparative researcher is interested in dealing with many cases a strategy can be implemented to enlarge the scope of a study investigating political protest in Western Europe. This strategy consists in discarding some items to check whether the new set of items forms a “more” comparable scale, i.e. a sub-scale of political protest. Of course, this goes with the cost of reducing the intension of the concept that is measured. Furthermore, the choice of using five items to measure political protest is not without critiques. Welzel and Deutsch (2012) argue that a scale of political protest can be constructed using only three items, getting rid of “unofficial strikes” and “occupying buildings or factories”. This is because: “these activities are closer to violence, so including them blurs the focus on non-violent protest. Second, these activities stick out from the others as being by far the least popular ones. They are used in every sample by such minor proportions of the respondents (consistently below 5 %) that responses are fully within the margin of sampling error” (Welzel and Deutsch 2012, 469). According to this argument, the scale was re-analyzed using three items. Table 2.6 shows that the  $H$  coefficient for the whole scale is high (above 0.50) in all the countries, meaning that this sub-scale is very strong.

The  $Z$  statistics strengthens the reliability of the scale since all coefficients are highly statistically significant. The  $H$  coefficients of the items also indicate that the three-item scale is acceptable since all values are  $\geq 0.30$ . Eventually, the most popular ordering of the items: (1) petitions, (2) demonstrations and (3) boycotts. This response pattern is the same in fifteen countries, while it varies for the other five. This analysis shows that reducing the number of items allows the scale to be applied in all twenty Western European countries, if the ordering is not taken into account. This means that a cumulative scale can be constructed, ranging from zero to three, where zero represents an individual who has not engaged in any political action and three represents a respondent who has engaged in all actions. Of course, reducing the number of items comes with a price: that the scale uses a different conceptualization of political protest, which does not account for more “intense” political actions.

Since the International Social Survey Programme (2007) and the European Social Survey (2011) contain the same three items the scale can be validated using these surveys. The Mokken Scale Analysis on the International Social Survey Programme data (Citizenship survey) indicates that the scale is homogeneous in all the countries ( $H \geq 0.30$ , see Table 2.7). Also  $H$  coefficients of the items are all above the suggested threshold. Conversely, the Mokken Scale Analysis on the European Social Survey data (fourth round) suggests discarding Denmark on the basis of a low item  $H$  coefficient for “demonstrations” (see Table 2.8), while Germany and Finland present borderline coefficients, which could be accepted. Figure 2.4 shows the mean

**Table 2.6**  $H$  coefficients, standard errors,  $Z$  statistics, and  $H_i$  coefficients for the index of political protest constructed with three items for each country using the European Values Survey

Country	$H$	s. e.	$Z$	$H_i$			Ordering		
				P	B	D	1st	2nd	3rd
AT	0.70	0.03	21.80	0.79	0.68	0.64	P	D	B
BE	0.65	0.03	19.34	0.68	0.66	0.62	P	D	B
CH	0.62	0.03	17.28	0.66	0.60	0.59	P	D	B
CY	0.59	0.04	18.24	0.59	0.63	0.58	D	P	B
DE	0.65	0.03	22.65	0.68	0.67	0.62	P	D	B
DK	0.54	0.03	18.22	0.57	0.58	0.49	P	D	B
ES	0.56	0.03	22.74	0.51	0.80	0.52	P	D	B
FI	0.58	0.03	18.02	0.69	0.54	0.52	P	B	D
FR	0.75	0.02	23.77	0.75	0.81	0.71	P	D	B
GB	0.69	0.03	21.64	0.89	0.63	0.63	P	D	B
GR	0.63	0.03	28.10	0.60	0.70	0.62	D	P	B
IE	0.73	0.03	18.66	0.87	0.68	0.68	P	D	B
IS	0.57	0.03	19.31	0.63	0.54	0.56	P	B	D
IT	0.63	0.03	23.89	0.60	0.78	0.59	P	D	B
LU	0.64	0.03	22.12	0.65	0.69	0.61	P	D	B
MT	0.72	0.03	27.56	0.70	0.79	0.68	P	D	B
NL	0.68	0.03	23.02	0.74	0.67	0.63	P	D	B
NO	0.61	0.03	16.17	0.75	0.56	0.57	P	D	B
PT	0.66	0.04	25.97	0.69	0.62	0.65	P	D	B
SE	0.54	0.03	16.47	0.67	0.55	0.49	P	B	D

Note: P = Signed a petition; B = Joining in boycotts; D = Attending lawful demonstrations

scores of the cumulative scales built using three items and the European Values Study, the International Social Survey Programme and the European Social Survey data, for each country where the data are available and  $H$  coefficients are above the threshold of 0.30.<sup>5</sup>

The scores are not similar between the three datasets used. It seems that the International Social Survey Programme data overestimates the mean scores, while the European Social Survey data underestimates it. The European Values Study data always present scores that are in between the other two datasets. This could pose serious questions about the comparability of these surveys. Also, the ordering of the items for both the International Social Survey Programme and the European Social Survey data is different from the one found using the European Social Survey data. The ordering for the two datasets is mostly: (1) petitions; (2) boycotts; and (3) demonstrations. It could be possible that the differences in the mean scores and items ordering are due to the different question wording used in the three

<sup>5</sup>In the International Social Survey Programme Belgium is Flanders and Germany is West Germany.

**Table 2.7**  $H$  coefficients, standard errors,  $Z$  statistics, and  $H_i$  coefficients for the index of political protest constructed with three items for each country using the International Social Survey Programme

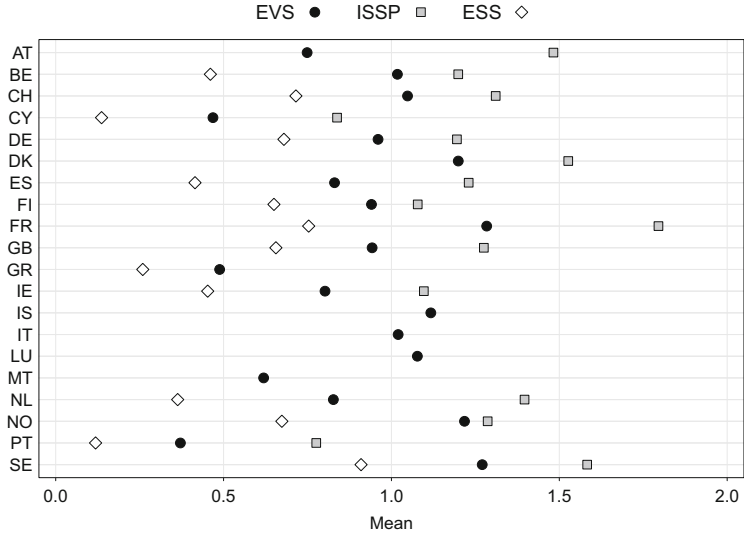
Country	$H$	s. e.	$Z$	$H_i$			Ordering		
				P	B	D	1st	2nd	3rd
AT	0.55	0.03	16.26	0.57	0.49	0.61	P	B	D
BE	0.41	0.03	14.40	0.57	0.37	0.36	P	D	B
CH	0.39	0.03	13.14	0.34	0.35	0.54	P	B	D
CY	0.45	0.05	11.06	0.50	0.41	0.44	D	P	B
DE	0.52	0.03	18.46	0.56	0.49	0.51	P	B	D
DK	0.42	0.03	14.62	0.47	0.38	0.41	P	B	D
ES	0.55	0.02	30.38	0.54	0.60	0.52	D	P	B
FI	0.51	0.03	20.57	0.49	0.49	0.61	P	B	D
FR	0.41	0.02	18.43	0.52	0.36	0.38	P	D	B
GB	0.71	0.04	15.00	0.73	0.68	0.72	P	B	D
IE	0.56	0.03	20.50	0.69	0.52	0.49	P	B	D
NL	0.56	0.02	24.08	0.67	0.49	0.53	P	B	D
NO	0.50	0.03	18.54	0.56	0.46	0.49	P	B	D
PT	0.48	0.02	27.99	0.50	0.52	0.43	P	D	B
SE	0.49	0.03	15.60	0.57	0.44	0.49	P	B	D

Note: P = Signed a petition; B = Joining in boycotts; D = Attending lawful demonstrations

**Table 2.8**  $H$  coefficients, standard errors,  $Z$  statistics, and  $H_i$  coefficients for the index of political protest constructed with three items for each country using the European Social Survey

Country	$H$	s. e.	$Z$	$H_i$			Ordering		
				P	B	D	1st	2nd	3rd
BE	0.44	0.03	18.41	0.52	0.42	0.38	P	B	D
CH	0.46	0.03	18.91	0.48	0.50	0.43	P	B	D
CY	0.36	0.06	16.54	0.34	0.43	0.34	B	P	D
DE	0.33	0.02	19.88	0.33	0.45	0.29	P	B	D
DK	0.26	0.03	10.75	0.29	0.32	0.19	P	B	D
ES	0.46	0.02	30.60	0.47	0.47	0.42	P	D	B
FI	0.32	0.02	14.93	0.30	0.64	0.29	P	B	D
FR	0.40	0.02	22.68	0.43	0.44	0.34	P	B	D
GB	0.48	0.03	19.74	0.50	0.57	0.43	P	B	D
GR	0.47	0.04	23.42	0.51	0.41	0.51	B	D	P
IE	0.38	0.03	18.89	0.45	0.34	0.34	P	B	D
NL	0.39	0.04	13.52	0.44	0.37	0.35	P	B	D
NO	0.42	0.03	15.07	0.45	0.49	0.35	P	B	D
PT	0.39	0.04	27.45	0.47	0.38	0.31	P	D	B
SE	0.38	0.03	14.85	0.38	0.51	0.33	P	B	D

Note: P = Signed a petition; B = Joining in boycotts; D = Attending lawful demonstrations



**Fig. 2.4** Mean of the index of political protest using three items from the European Values Study, the International Social Survey Programme and the European Social Survey for the available countries

questionnaires. In fact, the European Values Study question also allows expressing an intention to engage in the forms of political protest, while the International Social Survey Programme and the European Social Survey questions only ask whether or not the responded has participated to the actions.

## 2.9 Conclusion

This chapter analyzed the concept of political protest and provided an empirical strategy, first, to measure its underlying latent trait and, second, to assess its cross-national equivalence in Western European countries. As argued, despite the tradition of concept formation and analysis is consolidated within the field of political science (Sartori 1984), as also demonstrated by recent publications (Goertz 2006; Collier and Gerring 2008), the importance of testing measurement instruments in comparative research is instead less prominent in the literature (Van Deth 1998; Jackman 2008; Ariely and Davidov 2012; Stegmuller 2011), regardless of the fact that it is an important stage of empirical research ensuring that the analyses carried out are unbiased (Jacoby 1999).

The chapter thus assessed the cross-national measurement equivalence of the index of political protest. First, according to the existing literature, the concept of political protest was outlined, distinguishing it from conventional political participation. Barnes and Kaase (1979) created the distinction between conventional

and unconventional political participation arguing that the latter addresses not only political institutions but also private subjects using more intense forms of political action. Accordingly, political participation can be seen as a sequence of “steps” of increasing intensity, from legal conventional participation, such as voting or campaigning, to unconventional participation activities, such as demonstrations, boycotts or occupations of buildings (Dalton 1988, 2008). The forms of unconventional political participation are political protest activities since they are direct and not mediated by institutions (Della Porta and Diani 2006; Tilly and Tarrow 2006), which have different degrees of “*legality*, that is, their conformity to positive legal norms relevant for a given type of behavior, and their *legitimacy*, that is, the extent to which a given population at a given point in time approves of or disapproves them” (Kaase and Marsh 1979a, 45). Since political protest can be conceptualized as a continuum, this chapter suggested to assess its unidimensionality, the homogeneity of the items capturing the underlying latent trait and its cross-national equivalence.

This chapter provides evidence about the cross-national equivalence of an index of political protest built using the items included in the European Values Study (2011), which was absent in the literature, although this measure is widely applied (see among others Dalton 1988, 2004, 2008; Jennings et al. 1989; Parry et al. 1992; Inglehart 1997; Norris 2002; Benson and Rochon 2004; Dalton et al. 2010; Welzel and Deutsch 2012). It was argued that the assessment of cross-national measurement equivalence is a very relevant component of comparative analysis. The growing possibilities that international and comparative surveys provide given the inclusion of more and more countries (Norris 2009) require that comparative researchers test their measurement instruments, in particular since the rising popularity of statistical methods particularly suited for quantitative comparative research (Steenbergen and Jones 2002; Gelman and Hill 2006). Therefore, assessing the equivalence of measurement instruments might ensure that the measure used has the same construct, i.e. the concept is measurable with the same set of items, across populations. It follows that the measurement instruments have the same meanings in different contexts. Further, and most importantly, it might suggest that the inferences drawn from the cases are correct. If measurement instruments are not tested it is difficult to be sure that the relations between dependent and independent variables are the product of real phenomena or just chance.

In the end, this volume will rely on the index employing the five items present in the fourth wave of the European Values Study as a measure of political protest, since it gives the opportunity of analyzing political protest in nineteen Western European democracies out of twenty (excluding Portugal), while using the largest conceptual intension. Using the three-item index would enlarge the number of comparable countries, but it would exclude two important actions underlying the concept of protest, that are “unofficial strikes” and “occupying buildings or factories”. Therefore, the five-item scale, although it excludes one country, allows measuring a “broader” concept of political protest.

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Political Protest in Western Europe  
Exploring the Role of Context in Political Action  
Quaranta, M.  
2015, XIV, 149 p., Hardcover  
ISBN: 978-3-319-22161-8