

# On the $\varphi$ -degree of inclusion

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(mainly based on joint work with Nicolás Madrid)

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ICFCA, Kassel

# Presentación

(Sí, en español)

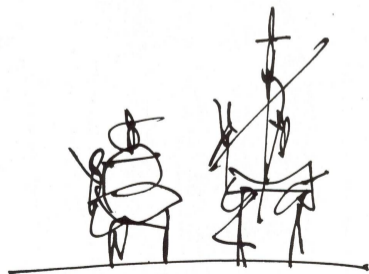
*Por ver que tiene este caso un no se qué . . . yo, por mi parte, os oiré, hermano, de muy buena gana, y así lo harán todos estos señores, por lo mucho que tienen de discretos y de ser amigos de curiosas novedades que suspendan, alegren y entretengan los sentidos, como, sin duda, pienso que lo ha de hacer vuestro cuento.*

*Comenzad, pues, amigo,  
que todos escucharemos.*

[[ Quijote I, cap 50 ]]

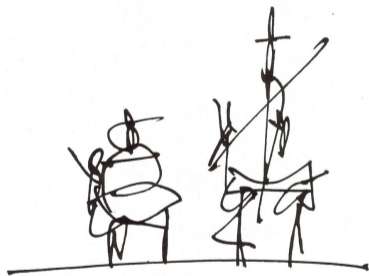
El Quijote

© Antonio Saura, 1987



# Opening

(in English)



El Quijote

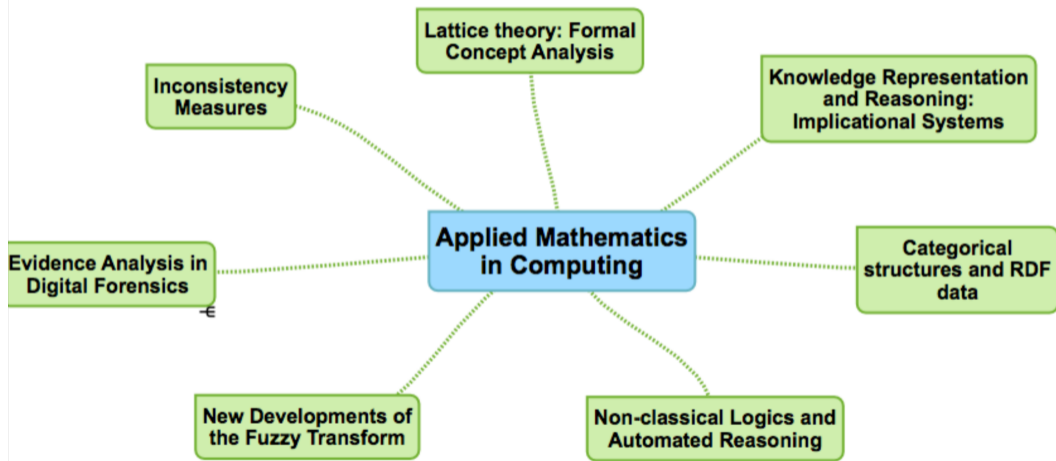
© Antonio Saura, 1955

*Seeing that this affair has a certain colour of chivalry about it, I for my part, brother, will hear you most gladly, and so will all these gentlemen, from the high intelligence they possess and their love of curious novelties that interest, charm, and entertain the mind, as I feel quite sure your story will do.*

*So begin, friend, for we are all prepared to listen.*

[[ Quixote I, chap 50 ]]

# Recent research lines of our group



# Introduction

- The notion of inclusion is undoubtedly one of the most important concepts in set theory.
- There is currently no consensus on how to extend this notion to fuzzy sets.

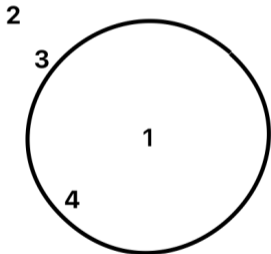


L.A. Zadeh (1965). Fuzzy sets. *Information and Control* 8(3):338–353

# Introduction

## Crisp sets vs fuzzy sets

- A standard (crisp) set  $A$  can be identified with its characteristic function  $\chi_A: \mathcal{U} \rightarrow \{0, 1\}$ .



Crisp set A

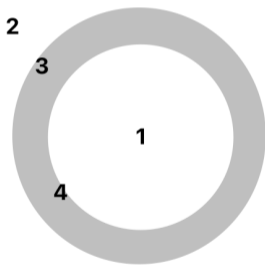
$$\mathcal{U} = \{1, 2, 3, 4\}$$

$$\chi_A(u) = \begin{cases} 1 & \text{if } u = 1 \\ 0 & \text{if } u = 2 \\ 0 & \text{if } u = 3 \\ 1 & \text{if } u = 4 \end{cases}$$

# Introduction

## Crisp sets vs fuzzy sets

- A fuzzy set **A** can be identified with its characteristic function  $\chi_A: \mathcal{U} \rightarrow [0, 1]$ .



Fuzzy set B

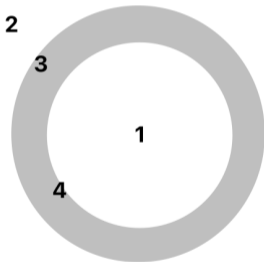
$$\mathcal{U} = \{1, 2, 3, 4\}$$

$$\chi_A(u) = \begin{cases} 1 & \text{if } u = 1 \\ 0 & \text{if } u = 2 \\ 0.2 & \text{if } u = 3 \\ 0.9 & \text{if } u = 4 \end{cases}$$

# Introduction

## Crisp sets vs fuzzy sets

- A fuzzy set  $\mathbf{A}$  can be identified with its characteristic function  $\chi_{\mathbf{A}}: \mathcal{U} \rightarrow [0, 1]$ .



Fuzzy set B

$$\mathcal{U} = \{1, 2, 3, 4\}$$

$$\chi_{\mathbf{A}}(u) = \begin{cases} 1 & \text{if } u = 1 \\ 0 & \text{if } u = 2 \\ 0.2 & \text{if } u = 3 \\ 0.9 & \text{if } u = 4 \end{cases}$$

- It is usual to abuse notation and write  $\mathbf{A}(u)$  instead of  $\chi_{\mathbf{A}}(u)$ .



# Introduction

## The question

How to define the inclusion between fuzzy sets?

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There are, at least, three approaches:

- The “analytic” one
- The “axiomatic” one
- The “functional” one

# Introduction

How to define the inclusion between fuzzy sets?

There are, at least, three approaches:

- The “analytic” one, in which we have
  - A *crisp* approach to inclusion between fuzzy sets

$$A \subseteq B \iff A(u) \leq B(u) \quad \forall u \in \mathcal{U}$$

- A *gradual* approach to inclusion between fuzzy sets

$$S(A, B) = \bigwedge_{u \in \mathcal{U}} A(u) \rightarrow B(u),$$



L.A. Zadeh (1965). Fuzzy sets. *Information and Control* 8(3):338–353



J.A. Goguen (1967). *L*-fuzzy sets. *J. of Mathematical Analysis and Applications* 18:145–174

# Introduction

## How to define the inclusion between fuzzy sets?

There are, at least, three approaches:

- The “axiomatic” one, for instance the approaches by
  - Sinha & Dougherty
  - Kitainik
  - Young



D. Sinha and E.R. Dougherty (1993). Fuzzification of set inclusion: Theory and applications. *Fuzzy Sets and Systems*, 55(1):15–42



L.M. Kitainik (1987). Fuzzy Inclusions and Fuzzy Dichotomous Decision Procedures. In *Optimization Models Using Fuzzy Sets and Possibility Theory*, pages 154–170, Springer



V. Young (1996). Fuzzy subsethood. *Fuzzy Sets and Systems*, 77(3):371–384

# Introduction

How to define the inclusion between fuzzy sets?

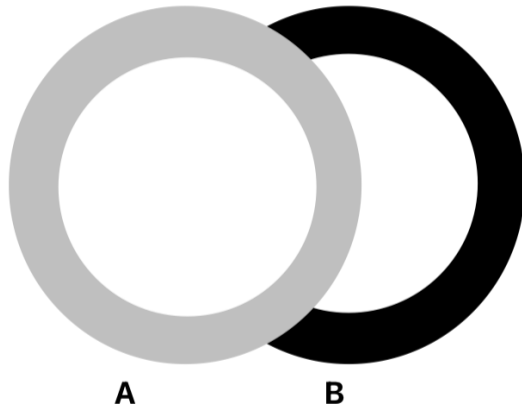
There are, at least, three approaches:

- The “functional” one, based on  $f$ -inclusion



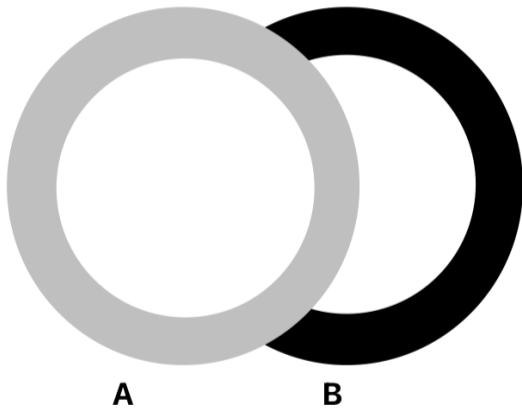
N. Madrid, **MOA**, and I. Perfilieva. *f-inclusion indexes between fuzzy sets*. In Proc. of IFSA-EUSFLAT, 2015

## $f$ -index of inclusion



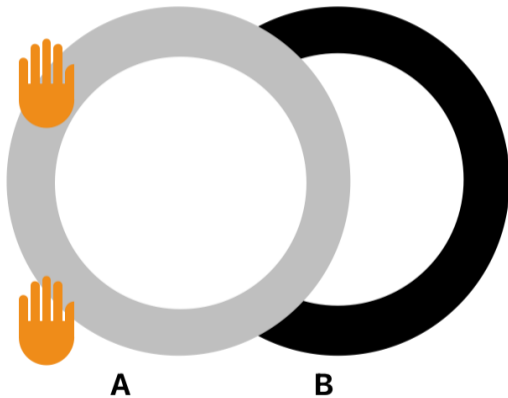
# $f$ -index of inclusion

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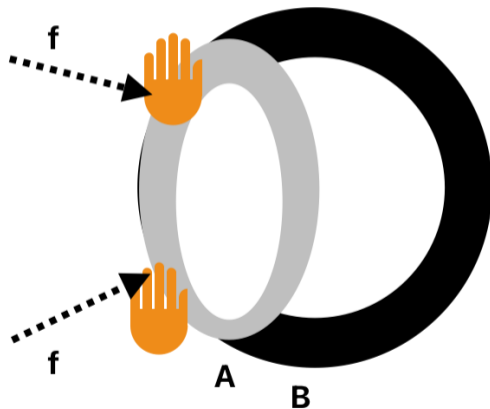
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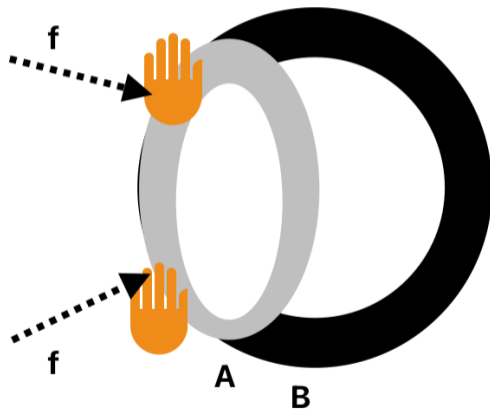
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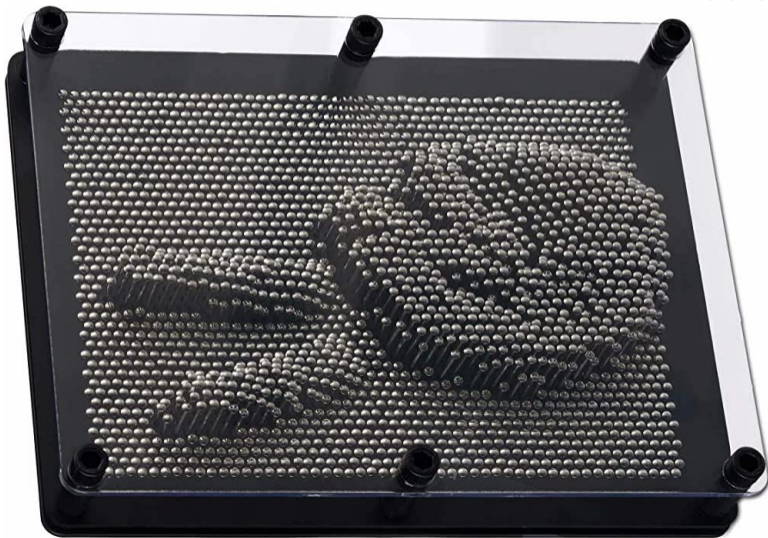
# $f$ -index of inclusion

Intuitive idea: squeeze  $A$  to fit into  $B$ . **Voilà, here we have an  $f$  ...**



# $f$ -index of inclusion

A more realistic interpretation



# $f$ -index of inclusion

The  $f$ -index of inclusion will be defined in three steps.

## Definition 1

The set of  $f$ -indexes of inclusion, denoted  $\Omega$ , is the set of all the increasing mappings  $f: [0, 1] \rightarrow [0, 1]$  satisfying  $f(x) \leq x$  for all  $x \in [0, 1]$ .

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## Definition 2

Let  $A$  and  $B$  be fuzzy sets and consider  $f \in \Omega$ . We say that  $A$  is  $f$ -included in  $B$  (denoted  $A \subseteq_f B$ ) if and only if  $f(A(u)) \leq B(u)$  holds for all  $u \in \mathcal{U}$ .

## $f$ -index of inclusion

### Definition 3

Let  $A$  and  $B$  be fuzzy sets, the  $f$ -index of inclusion of  $A$  in  $B$ , denoted  $\text{Inc}(A, B)$ , is defined as

$$\text{Inc}(A, B) = \max\{f \in \Omega \mid A \subseteq_f B\}$$

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### Theorem

Let  $\mathbf{A}$  and  $\mathbf{B}$  be two fuzzy sets, then  $\mathbf{Inc}(\mathbf{A}, \mathbf{B})(x) = x \wedge \bigwedge_{u \in \mathcal{U}} \{B(u) \mid x \leq A(u)\}$ .

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In order to justify the use of  $\mathbf{Inc}(\mathbf{A}, \mathbf{B})$  as a suitable index of inclusion between two fuzzy sets, we recall the axiomatic approach by Sinha & Dougherty.



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In order to justify the use of  $\mathbf{Inc}(\mathbf{A}, \mathbf{B})$  as a suitable index of inclusion between two fuzzy sets, we recall the axiomatic approach by Sinha & Dougherty.

-  N. Madrid and **MOA**. *Functional degrees of inclusion and similarity between L-fuzzy sets*. Fuzzy Sets and Systems, **390** (2020), 1–22.

# Axioms of Sinha & Dougherty

## Definition

The mapping  $S: \mathcal{F}(\mathcal{U}) \times \mathcal{F}(\mathcal{U}) \rightarrow [0, 1]$  is an *SD-measure of inclusion* if the following axioms hold for all fuzzy sets  $A, B$  and  $C$ :

(SD1)  $S(A, B) = 1$  if and only if  $A(u) \leq B(u)$  for all  $u \in \mathcal{U}$ .

(SD2)  $S(A, B) = 0$  if and only if there is  $u \in \mathcal{U}$  such that  $A(u) = 1$  and  $B(u) = 0$ .

(SD3) Si  $B(u) \leq C(u)$  for all  $u \in \mathcal{U}$  then  $S(A, B) \leq S(A, C)$ .

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(SD5) If  $T: \mathcal{U} \rightarrow \mathcal{U}$  is a bijective mapping in  $\mathcal{U}$ , then  $S(A, B) = S(T(A), T(B))$ .

(SD6)  $S(A, B) = S(B^c, A^c)$ .

(SD7)  $S(A \cup B, C) = \min\{S(A, C), S(B, C)\}$ .

(SD8)  $S(A, B \cap C) = \min\{S(A, B), S(A, C)\}$ .

# $f$ -index of inclusion

Relation with Sinha & Dougherty axioms

## Theorem

Given fuzzy sets  $A, B$  and  $C$

- 1  $\text{Inc}(A, B) = \text{id}$  if and only if  $A(u) \leq B(u)$  for all  $u \in \mathcal{U}$ .
- 2  $\text{Inc}(A, B) = \perp$  if and only if there exists a sequence  $\{u_i\}_{i \in \mathbb{N}} \subseteq \mathcal{U}$  such that  $A(u_i) = 1$  for all  $i \in \mathbb{N}$  and  $\bigwedge_{i \in \mathbb{N}} B(u_i) = 0$ .
- 3 If  $B(u) \leq C(u)$  for all  $u \in \mathcal{U}$  then  $\text{Inc}(C, A) \leq \text{Inc}(B, A)$ .
- 4 If  $B(u) \leq C(u)$  for all  $u \in \mathcal{U}$  then  $\text{Inc}(A, B) \leq \text{Inc}(A, C)$ ;
- 5 Let  $T: \mathcal{U} \rightarrow \mathcal{U}$  be bijective on  $\mathcal{U}$ , then  $\text{Inc}(A, B) = \text{Inc}(T(A), T(B))$ .
- 6
- 7  $\text{Inc}(A, B \cap C) = \text{Inc}(A, B) \wedge \text{Inc}(A, C)$ .
- 8  $\text{Inc}(A \cup B, C) = \text{Inc}(A, C) \wedge \text{Inc}(B, C)$ .

## $f$ -index of inclusion (comments)

- Notice that (SD6) does not appear in the theorem.

### Definition

Let  $A$  and  $B$  be fuzzy sets, the *measure of inclusion* of  $A$  in  $B$  is defined by

$$M_{\text{Inc}}(A, B) = 2 \int_0^1 \text{Inc}(A, B)(x) dx.$$

### Theorem (SD6 recovered)

Let  $A$  and  $B$  be fuzzy sets, then  $M_{\text{Inc}}(A, B) = M_{\text{Inc}}(B^c, A^c)$ .

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# Applications of $f$ -inclusion

$f$ -index of inclusion and entropy

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$f$ -index of inclusion and entropy


## Definition (De Luca & Termini, 1972)

A mapping  $E: \mathcal{F}(\mathcal{U}) \rightarrow \mathbb{R}$  is called a *measure of fuzzy entropy* if it satisfies the following axioms for all fuzzy sets  $A$  and  $B$ :

(E1)  $E(A) = 0$  if and only if  $A(u) \in \{0, 1\}$  for all  $u \in \mathcal{U}$ .

(E2)  $E(A)$  reaches the maximum value if and only if  $A(u) = 0.5$  for all  $u \in \mathcal{U}$ .

(E3)  $E(A) \leq E(B)$  if  $A$  is a refinement of  $B$ .

 A. De Luca and S. Termini. *A definition of a non-probabilistic entropy in the setting of fuzzy sets theory*. Information and Control, 20(4):301–312, 1972.



# Applications of $f$ -inclusion

$f$ -index of inclusion and entropy


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(E3)  $E(A) \leq E(B)$  if  $A$  is a refinement of  $B$  (that is, if  $A(u) \leq B(u)$  if  $B(u) \leq 0.5$  and  $B(u) \leq A(u)$  if  $B(u) \geq 0.5$ ).

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# Applications of $f$ -inclusion

$f$ -index of inclusion and entropy

## Definition

Let  $\mathbf{A}$  be a fuzzy set defined on a finite universe, and let  $\mathbf{n}$  be a strictly decreasing negation such that  $\mathbf{n}(0.5) = 0.5$ . The measure of fuzzy entropy  $\mathbf{E}$  induced by the  $\varphi$ -index of inclusion and the negation  $\mathbf{n}$  is given by:

$$\mathbf{E}(\mathbf{A}) = \widehat{\mathbf{M}}_{Inc}(\mathbf{A} \cup \mathbf{n}(\mathbf{A}), \mathbf{A} \cap \mathbf{n}(\mathbf{A}))$$

where  $\widehat{\mathbf{M}}_{Inc}$  is defined by

$$\widehat{\mathbf{M}}_{Inc}(\mathbf{A}, \mathbf{B}) = \frac{\sum_{u \in \mathcal{U}} \mathbf{M}_{Inc}(\mathbf{A}_u, \mathbf{B}_u)}{\text{Card}(\mathcal{U})}$$

# Applications of $f$ -inclusion

$f$ -index of inclusion and entropy

## Theorem

The mapping  $E$  induced by the  $\varphi$ -index of inclusion and a strictly decreasing negation  $n$  such that  $n(0.5) = 0.5$ , is a De Luca-Termini measure of fuzzy entropy.

## Proposition

Let  $A$  be a fuzzy set defined on a finite universe and let  $n$  be a strictly decreasing negation such that  $n(0.5) = 0.5$ , then

$$E(A) = \frac{\sum_{u \in \mathcal{U}} 1 - (A(u) - n(A(u)))^2}{\text{Card}(\mathcal{U})}$$

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$f$ -index of inclusion and entropy

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# Applications of $f$ -inclusion

$f$ -index of inclusion and modus ponens inference

## Theorem

Let  $\mathbf{A}$  and  $\mathbf{B}$  be fuzzy sets defined on a finite universe  $\mathcal{U}$ , then there exists an adjoint pair  $(*, \rightarrow)$  such that

$$\text{Inc}(\mathbf{A}, \mathbf{B})(x) = x * \left( \bigwedge_{u \in \mathcal{U}} \mathbf{A}(u) \rightarrow \mathbf{B}(u) \right)$$

Note the relationship with Zadeh's compositional rule of inference.

# Applications of $f$ -inclusion

$f$ -index of inclusion and modus ponens inference

As a consequence, we obtain a Modus Ponens *à la*  $f$ -index of inclusion.

$$\begin{array}{l} \mathbf{A} \Rightarrow \mathbf{B} \quad \equiv \text{Inc}(\mathbf{A}; \mathbf{B}) \\ \mathbf{A}(u) \quad \equiv \beta \\ \hline \therefore \mathbf{B}(u) \quad \geq \text{Inc}(\mathbf{A}; \mathbf{B})(\beta) \end{array}$$


# Applications of $f$ -inclusion

$f$ -index of inclusion and modus ponens inference

As a consequence, we obtain a Modus Ponens *à la*  $f$ -index of inclusion.

$$\begin{array}{rcl} A \Rightarrow B & \equiv & \text{Inc}(A; B) \\ A(u) & \equiv & \beta \\ \hline \therefore B(u) & \geq & \text{Inc}(A; B)(\beta) \end{array}$$

- The value of the inference in terms of the  $f$ -index of inclusion is the greatest among all the possible inferences that can be done using adjoint pairs.

 N. Madrid and **MOA**. *The  $\varphi$ -index of inclusion as optimal adjoint pair for fuzzy modus ponens*. Fuzzy Sets and Systems **466**:Article 108474, 2023.

# Applications of $f$ -inclusion

$f$ -index of contradiction

As with  $f$ -inclusion, the underlying idea here is to measure contradiction not with real values, but with certain mappings in the unit interval, that should satisfy some properties that resemble negation operators.

## Definition

The set of  $f$ -indexes of contradiction (denoted by  $\bar{\Omega}$ ) is the set of mappings  $f: [0, 1] \rightarrow [0, 1]$  satisfying the following properties for all  $x, y \in [0, 1]$ :

- $f(0) = 1$ ;
- if  $x \leq y$  then  $f(y) \leq f(x)$



# Applications of $f$ -inclusion

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# Applications of $f$ -inclusion

$f$ -index of contradiction

## Definition

Let  $\mathbf{A}$  and  $\mathbf{B}$  be two fuzzy sets defined over a nonempty universe  $\mathcal{U}$  and let  $f \in \bar{\Omega}$ . We say that  $\mathbf{A}$  is  $f$ -weakly-contradictory wrt  $\mathbf{B}$  if and only if  $\mathbf{A}(u) \leq f(\mathbf{B}(u))$  holds for all  $u \in \mathcal{U}$ .



# Applications of $f$ -inclusion

$f$ -index of contradiction

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The  $f$ -weak-contradiction in [BMO15] generalizes the  $\mathbf{N}$ -contradiction from [TAJ'99].

-  H. Bustince, N. Madrid, and **MOA**. *The Notion of Weak-Contradiction: Definition and Measures*. IEEE Trans. Fuzzy Systems, **23**(4) (2015), 1057–1069.
-  E. Trillas, C. Alsina, and J. Jacas (1999) *On contradiction in fuzzy logic*. Soft Computing, 3(4):197–199

# Applications of $f$ -inclusion

$f$ -index of contradiction

## Definition

Let  $\mathbf{A}$  and  $\mathbf{B}$  be two fuzzy sets, the  $f$ -index of contradiction of  $\mathbf{A}$  wrt  $\mathbf{B}$ , denoted by  $\mathbf{Con}(\mathbf{A}, \mathbf{B})$ , is given by the least mapping  $f \in \bar{\Omega}$  verifying that  $\mathbf{A}$  is  $f$ -weakly-contradictory wrt  $\mathbf{B}$ .

# Applications of $f$ -inclusion


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The following analytic expression for  $Con(A, B)(x)$  can be found in [BMO15]:

$$Con(A, B)(x) = \begin{cases} 1 & \text{if } x = 0 \\ \sup_{u \in \mathcal{U}} \{A(u) \mid x \leq B(u)\} & \text{otherwise.} \end{cases}$$

 H. Bustince, N. Madrid, and MOA. *The Notion of Weak-Contradiction: Definition and Measures*. IEEE Trans. Fuzzy Systems, **23**(4) (2015), 1057–1069.

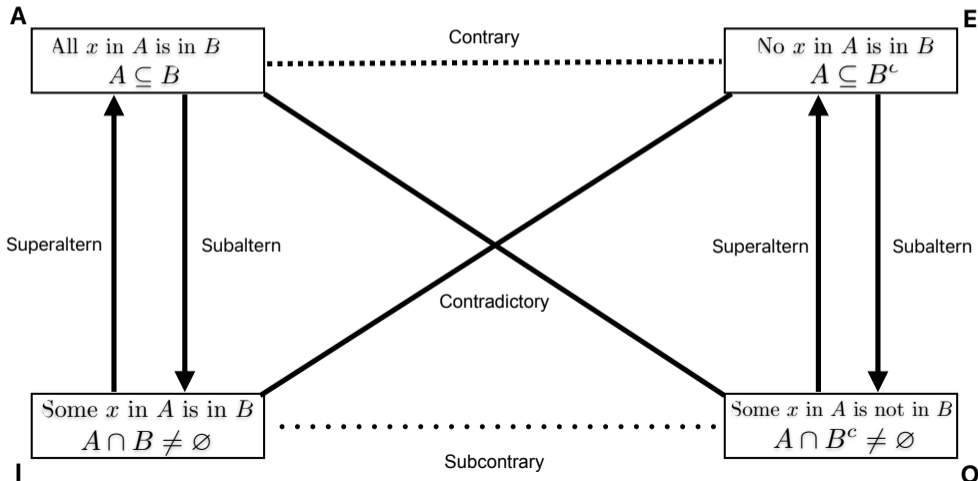
# Applications of $f$ -inclusion

## On the square of opposition

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- The rest of  $f$ -indexes can be allocated in the diagonals of the extreme cases.
- We prove that the Contradiction, Contrariety, Subcontrariety, Subalternation and Superalternation relations also hold between the  $f$ -indexes of inclusion and contradiction.

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 N. Madrid and **MOA**. *Approaching the square of oppositions in terms of the  $\varphi$ -indexes of inclusion and contradiction*. Under review (R1 Submitted)

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On the square of opposition

## Proposition (Contrariety and Subcontrariety)

Let  $\mathbf{A}$  and  $\mathbf{B}$  be two fuzzy sets such that  $\mathbf{A}$  is normal, then  $\mathbf{Inc}(\mathbf{A}, \mathbf{B}) < \mathbf{Con}(\mathbf{B}, \mathbf{A})$ .

## Proposition (Subaltern $f$ -index of inclusion)

Let  $\mathbf{A}$  and  $\mathbf{B}$  be two fuzzy sets such that  $\mathbf{A}$  is normal, then there exists  $\mathbf{u} \in \mathcal{U}$  such that  $(\mathbf{A} \cap \mathbf{B})(\mathbf{u}) \geq \mathbf{Inc}(\mathbf{A}, \mathbf{B})(1)$ .

## Proposition (Subaltern $f$ -index of contradiction)

Let  $\mathbf{A}$  and  $\mathbf{B}$  be two fuzzy sets such that  $\mathbf{A}$  is normal and let  $\mathbf{n}$  be an involutive negation. Then there exists  $\mathbf{u} \in \mathcal{U}$  such that  $(\mathbf{A} \cap \mathbf{B}^c)(\mathbf{u}) \geq \mathbf{n}(\mathbf{Con}(\mathbf{B}, \mathbf{A})(1))$ .

# Other applications of $f$ -inclusion

## On the logic of $f$ -inclusion

- Recently we have focused on providing a sound and complete logic to formalise and reason about  $f$ -indices of inclusion.
- That logic is based on the S5-like modal extension of  $n$ -valued Łukasiewicz logic with truth-constants,  $S5(\mathbb{L}_n^c)$ .
- We take advantage of the good logical and expressive properties of this logical setting to define the logic  $\mathbb{L}_n$  to *reason* about  $f$ -indexes of inclusion.
- We provide a first step towards a logical account of the notion of  $f$ -index of inclusion for fuzzy sets. We plan to consider a more general many-valued logical setting lifting the assumption of dealing with finitely-many truth-degrees.

 T. Flaminio, Ll. Godo, N. Madrid, **MOA**. *A logic to reason about  $f$ -indices of inclusion over  $\mathbb{L}_n$* . Proc. of the Eur. Conf. on Fuzzy Logic and Technology (EUSFLAT), 2023.

## Conclusions and future work

- We have seen that strong indications that the  $f$ -index of inclusion is a convenient operator to represent inclusion between fuzzy sets.
- Currently, we are working on the integration of the  $f$ -index of inclusion with fuzzy formal concept analysis.

# Closing

Thank you for your attention!!

*And these are the curious things I told  
you I had to tell, and if you don't think  
them so, I have got no others.*

*Y estas son las maravillas que dije que  
os había de contar.*

*Y si no os lo han parecido, no sé otras.*

[[ Quijote II, cap 25 ]]

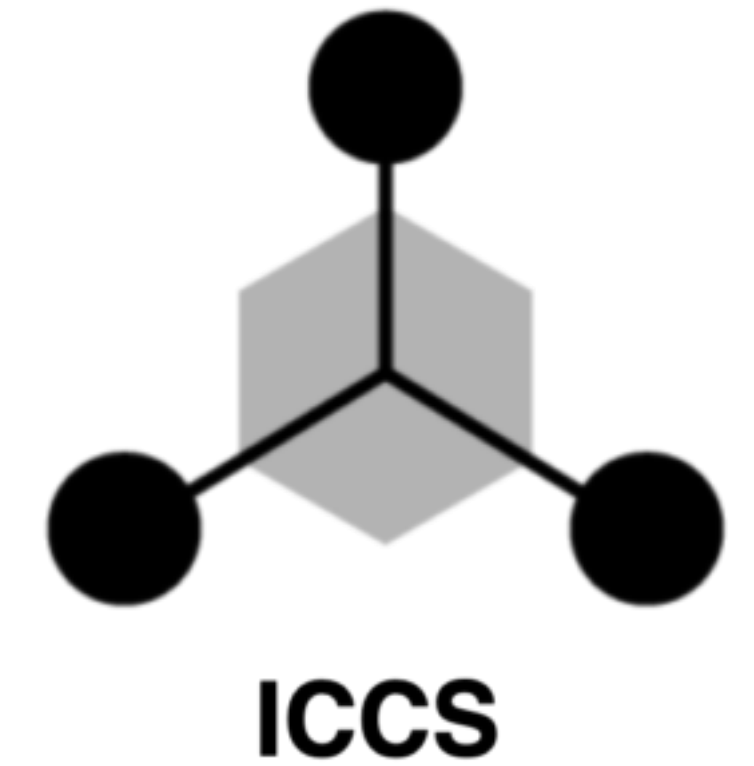


Don Quixote

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  - Camille Roth: *Semantic graphs and social networks*



# On the $\varphi$ -degree of inclusion

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ICFCA, Kassel