

**CIVIL SOCIETY AND ECONOMIC DEVELOPMENT IN
MOROCCO: MAPPING THE ASSOCIATIVE SECTOR**

**A CIVIL TÁRSADALOM ÉS A GAZDASÁGI FEJLŐDÉS
MAROKKÓBAN: AZ EGYESÜLETI SEKTOR
FELTÉRKÉPEZÉSE**

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Keywords: *Civil Society Organizations, Associations, Nonprofit Sector, Morocco, Economic
Development, Regional Disparities, Social Economy*

Kulcsszavak: *civil társadalmi szervezetek, egyesületek, nonprofit szektor, Marokkó, gazdasági fejlődés,
regionális egyenlőtlenségek, szociális gazdaság*

JEL-kód: *L31, O53, R11, I38, R50*

<https://doi.org/10.33565/MKSV.2025.02.04>

ABSTRACT

Civil society organizations (CSOs), primarily associations, have grown significantly in Morocco since the promulgation of the Dahir on the Right of Association in 1958. While much research has addressed their political and social roles, their economic contribution remains under-documented. Using secondary data from the Census of Economic Establishments 2023/2024 (CEE) conducted by the High Commission for Planning, this paper analyzes the structure, distribution, and fields of activity of Moroccan associations. The CEE identified 27,481 nonprofit associations operating in independent premises, representing 2.1% of all national establishments, with concentrations in Souss-Massa (15.7%), Marrakech-Safi (15.0%), and Casablanca-Settat (12.8%). Functionally, they are most active in development and housing (27.9%), education and research (26.2%), and culture, sport, and leisure (22.5%). Although precise employment and budgetary data are lacking, evidence suggests CSOs act as both social partners and economic actors, delivering services, fostering inclusion, and supporting local economies. Future research should quantify their employment and financial impact.

ABSZTRAKT

A civil társadalmi szervezetek (civil society organizations, CSO-k), elsősorban az egyesületek, jelentős növekedést mutattak Marokkóban az 1958-as Egyesülési Jogot Szabályozó Dahir kihirdetését követően. Míg a szakirodalom széles körben tárgyalja politikai és társadalmi szerepüket, gazdasági hozzájárulásuk mindaddig alulreprezentált maradt a kutatásokban. A Marokkói Felső Tervezési Bizottság által végrehajtott Gazdasági Egységek Népszámlálása 2023/2024 (Census of Economic Establishments, CEE) másodlagos adatainak felhasználásával e tanulmány a marokkói egyesületek szerkezetét, területi megoszlását és tevékenységi területeit elemzi.

A CEE összesen 27 481, önálló telephelyen működő nonprofit egyesületet azonosított, amelyek az országos gazdasági egységek 2,1%-át teszik ki. Területi koncentrációjuk különösen erős a Souss–Massa (15,7%), a Marrakesh–Safi (15,0%) és a Casablanca–Settat régiókban (12,8%). Funkcionális megoszlásukat tekintve leginkább a fejlesztés és lakhatás (27,9%), az oktatás és kutatás (26,2%), valamint a kultúra, sport és szabadidő (22,5%) területén aktívak. Bár részletes foglalkoztatási és költségvetési adatok nem állnak rendelkezésre, a rendelkezésre álló empirikus bizonyítékok arra utalnak, hogy a civil társadalmi szervezetek egyszerre töltenek be társadalmi partneri és gazdasági szereplői funkciókat: közszolgáltatásokat nyújtanak, elősegítik a társadalmi befogadást, valamint hozzájárulnak a helyi gazdaságok működéséhez és fejlődéséhez. A jövőbeni kutatásoknak célszerű lenne számszerűsíteni e szervezetek foglalkoztatási és pénzügyi hatását.

INTRODUCTION

Civil society organizations (CSOs) in Morocco, most often legally constituted as associations, have emerged as significant actors in social development and public policy implementation. Since the promulgation of the Dahir of 1958 on the Right of Association, subsequently amended in 2002, 2009, and 2018, Morocco has witnessed a steady expansion in the number and diversity of associations across its 12 regions (Zaki, 2015; Sater, 2020). While their role in democratization, social participation, and human rights has been the subject of substantial scholarship, their economic footprint remains comparatively under-studied (Catusse & Vairel, 2010).

Recent data from the Census of Economic Establishments 2023/2024 conducted by the High Commission for Planning (HCP) indicates the existence of 27,481 nonprofit establishments—associations operating in independent premises—representing 2.1% of all establishments in the country. These associations are unevenly distributed: the regions of Souss-Massa (15.7%), Marrakech-Safi (15.0%), and Casablanca-Settat (12.8%) concentrate the highest shares, while southern regions such as Laâyoune-Sakia El Hamra (0.9%) and Dakhla-Oued Eddahab (0.3%) host far fewer.

Beyond their territorial distribution, associations display a broad functional spectrum. According to HCP, nearly 28% focus on development and housing, 26% on education and research, and 22.5% on culture, sport, and leisure. These figures reflect both Morocco's development priorities and the state's reliance on civil society as a partner in implementing the National Initiative for Human Development (INDH), launched in 2005 to combat poverty and social exclusion (HCP, 2019; World Bank, 2017).

Despite this expansion, questions remain regarding the real economic contribution of CSOs. Unlike for-profit enterprises, associations' employment, budgets, and output are less systematically measured. Nevertheless, they operate schools, literacy programs, cooperatives, health caravans, and sport clubs—activities that generate both direct employment and indirect socio-economic benefits (Chahim & Prakash, 2014; Kausch, 2008). This study therefore aims to provide a structured overview of the landscape of CSOs in Morocco, focusing on their size, distribution, fields of activity, and potential contribution to economic life.

Civil Society Organizations: Concepts, Economic Roles, and Historical Evolution

Civil Society Organizations and Development: Global Perspectives

Civil society organizations (CSOs) are widely recognized as key actors in development processes across diverse political and economic contexts. Beyond their normative role in promoting participation and social cohesion, CSOs contribute to development by delivering public and quasi-public goods, mobilizing local resources, and reaching populations underserved by the state or market (Salamon & Anheier, 1996; Evers & Laville, 2004). In many low- and middle-income countries, CSOs have played a compensatory role, providing education, health services, social protection, and community infrastructure where public capacity is limited.

From an economic perspective, CSOs contribute to development through multiple channels. They generate employment, stimulate local demand through project-based spending, and enhance human capital by investing in education, skills, and social inclusion. Empirical studies from Latin America, Sub-Saharan Africa, and Eastern Europe show that nonprofit organizations can have significant multiplier effects at the local level, particularly in rural and marginalized areas (Salamon et al., 2010; Puka, 2018).

At the same time, the role of CSOs in democratization processes has been ambivalent. While civil society is often associated with political liberalization, accountability, and citizen empowerment, research highlights recurring constraints. These include dependence on state or donor funding, regulatory restrictions, uneven organizational capacity, and selective inclusion by political authorities (Ben Néfissa et al., 2005; Kausch, 2008). In semi-authoritarian or hybrid regimes, CSOs are frequently encouraged as service providers while facing limitations when engaging in rights-based advocacy or political mobilization.

This dual character—CSOs as both development partners and politically constrained actors—constitutes a central theme in the comparative literature and provides an essential framework for analyzing civil society in specific national contexts, including Morocco.

Economic Theories of the Nonprofit Sector

The economic role of civil society organizations has been theorized primarily within the literature on the nonprofit or third sector. Classical economic explanations emphasize market and government failure theories, which view nonprofits as responses to unmet demand for public goods and services where

markets fail due to information asymmetries or where governments are unable or unwilling to intervene (Salamon & Anheier, 1996). In this perspective, CSOs occupy an intermediate space between the state and the market, providing trust-based services and addressing collective needs.

More recent approaches conceptualize CSOs as integral components of the social and solidarity economy, alongside cooperatives and mutual organizations (Evers & Laville, 2004). This framework emphasizes not only service provision but also employment creation, social innovation, and local development. Empirical evidence suggests that the nonprofit sector can represent a non-negligible share of employment and value added, even in developing economies, although its economic contribution is often underestimated due to statistical invisibility (Salamon et al., 2010).

From this standpoint, CSOs should be analyzed not solely as social or political actors, but as economic institutions embedded in territorial and sectoral dynamics. Their contribution extends beyond direct employment to include indirect effects on entrepreneurship, human capital formation, and social cohesion. However, measuring these contributions remains challenging due to fragmented data, informality, and the hybrid nature of many organizations—limitations that are particularly acute in North African contexts.

This theoretical lens provides a useful foundation for interpreting the Moroccan case, where associations operate at the intersection of social policy, local development, and economic activity, yet remain weakly captured by conventional economic statistics.

Historical Evolution of Civil Society in Morocco

The concept of civil society has long been contested, with definitions varying between the Anglo-American “nonprofit sector” model (Salamon & Anheier, 1996) and the European “third sector” approach, which includes cooperatives, associations, and mutual aid societies (Evers & Laville, 2004). In the Moroccan context, associations—voluntary, nonprofit organizations registered under the Dahir of 1958—form the core of civil society (Sater, 2007). They differ from cooperatives, which are governed by separate legislation (notably Law 112-12 on cooperatives, 2014), and from foundations, which often operate with state patronage.

Historically, Moroccan associations developed in three waves. The first, from independence in 1956 to the 1980s, was characterized by charitable and religious associations, often tolerated but closely monitored by the state (Zaki, 2015). The

second wave, in the 1990s, saw the rise of human rights organizations, feminist movements, and development NGOs, coinciding with political liberalization and international donor support (Catusse & Vairel, 2010). The third wave, since the 2000s, has been linked to the National Initiative for Human Development (INDH), which positioned associations as local development partners in poverty alleviation, literacy, health, and infrastructure projects (World Bank, 2017).

Today, associations are recognized not only as vehicles of civic participation but also as economic actors. The Census of Economic Establishments (CEE) 2023/24 confirms their presence across all regions and identifies their functional areas, underscoring their role in education, sport, and development. However, as in other developing contexts, the distinction between active and inactive associations remains blurred, and comprehensive data on their budgets, employment, and long-term sustainability are lacking (Kausch, 2008). This complexity calls for more systematic research on the economic dimensions of Moroccan civil society.

Theoretical Framework

This study adopts a plural theoretical framework combining nonprofit economic theory, institutional analysis, and local development approaches. This integrated perspective allows civil society organizations (CSOs) to be analyzed not only as social or political actors but also as economic institutions embedded in regulatory and territorial contexts.

First, the paper draws on nonprofit economics, particularly the theories of market and government failure (Salamon & Anheier, 1996). According to this perspective, nonprofit organizations emerge in sectors where markets fail to provide services due to information asymmetries, low profitability, or externalities, and where governments face fiscal, administrative, or political constraints. Associations thus tend to concentrate in domains such as education, social services, culture, and local development—sectors characterized by high social demand and limited market incentives. This framework helps interpret the sectoral distribution of Moroccan associations observed in the Census of Economic Establishments (CEE), especially their predominance in development, education, and socio-cultural activities.

Second, the study incorporates institutional theory, which emphasizes the role of legal frameworks, state–society relations, and public policy instruments in shaping organizational behavior (Evers & Laville, 2004). In many developing and semi-authoritarian contexts, CSOs operate within institutional environments that

simultaneously promote their involvement in service delivery while constraining their autonomy. In Morocco, the Dahir on the Right of Association and policy initiatives such as the National Initiative for Human Development (INDH) have structured the expansion of associations by encouraging their participation in local development projects. This institutional lens is essential for understanding both the rapid growth of associations and the observed orientation toward development-related activities.

Third, the paper mobilizes insights from local development and social economy theories, which conceptualize CSOs as territorially embedded actors contributing to employment, social inclusion, and human capital formation (Salamon et al., 2010). From this perspective, the economic role of associations extends beyond direct employment to include indirect and long-term effects on local economies, particularly in rural and disadvantaged regions. The uneven regional distribution of Moroccan associations, as revealed by the CEE, can thus be interpreted as reflecting both disparities in economic development and the compensatory function of CSOs in areas with weaker public service provision.

Together, these theoretical approaches provide a coherent framework for interpreting the empirical findings of this study. Rather than measuring causal impacts, the paper uses descriptive evidence on size, distribution, and fields of activity to assess how Moroccan associations are positioned within the national economy and regional development dynamics.

MATERIALS AND METHODS

This study is based on secondary data analysis, a methodological approach that relies on existing statistical sources rather than primary data collection (Babbie, 2014). This strategy is particularly appropriate in contexts where comprehensive and standardized economic data on civil society organizations (CSOs) are limited or fragmented. In such cases, establishment-based censuses constitute a critical empirical foundation for mapping the structure and spatial distribution of the nonprofit sector.

Data Source

The primary dataset used is the Census of Economic Establishments 2023/2024 (CEE) conducted by the High Commission for Planning (HCP). The CEE is a nationwide census that records all non-agricultural economic establishments operating in Morocco and provides georeferenced information classified by

institutional type (for-profit, public, and nonprofit/associative), sector of activity, and administrative region (HCP, 2024).

Out of approximately 1.3 million establishments identified nationwide, the census records 27,481 nonprofit associations operating in independent premises, representing 2.1% of the total establishment base (HCP, 2024, p. 11). These associations are further categorized by field of activity (e.g., development and housing, education and research, culture, sport and leisure, health, social services) and by territorial location, including regional and urban–rural classification.

Analytical Strategy and Variable Construction

The study adopts an exploratory and descriptive analytical strategy, which is justified by the absence of systematic national data on nonprofit employment, financial accounts, and value added. Rather than estimating causal impacts, the objective is to document the size, sectoral orientation, and territorial distribution of Moroccan associations and to interpret these patterns through established theoretical perspectives from nonprofit economics, institutional analysis, and local development.

Three main categories of variables are used in the analysis:

1. Number of associations: The count of nonprofit establishments operating in independent premises is used as a proxy for organizational presence and potential economic activity. While this indicator does not measure output or employment directly, it provides an approximation of institutional density and service capacity within regions and sectors.
2. Field of activity: Sectoral classification serves as a proxy for the type of socio-economic functions performed by associations. Activities such as education, development, and social services are generally associated with higher labor intensity and longer-term human capital effects, making them relevant for assessing the economic positioning of CSOs.
3. Territorial distribution: Regional and urban–rural location variables are used to analyze spatial embeddedness and potential contributions to local development. This approach draws on theories emphasizing the compensatory role of CSOs in regions characterized by weaker market provision or limited public service coverage.

The analysis primarily relies on descriptive statistics, including counts, percentages, and comparative tables by region and field of activity. To

complement these descriptive measures, a simple spatial concentration indicator (location quotient) is employed to assess the relative concentration of associations across regions by comparing each region's share of associations with its share of total establishments nationwide. This indicator allows for a more nuanced interpretation of regional disparities without implying causality.

Methodological Scope and Limitations

Several methodological limitations must be acknowledged. First, the CEE records only registered associations operating in independent premises, thereby excluding informal organizations or those functioning without dedicated infrastructure. Second, the census does not distinguish between active and inactive associations, a recurring challenge in Moroccan civil society research (Kausch, 2008).

Third, although financial and employment data would substantially strengthen the assessment of economic contribution, such information is not available in a centralized or standardized format for Moroccan associations. Administrative financial records are fragmented across ministries and funding agencies, and reporting obligations vary widely among CSOs. As a result, direct measures of budgets, employment levels, and value added cannot be incorporated at the national scale.

Despite these constraints, establishment-based mapping remains a necessary and methodologically justified first step for analyzing the associative sector. Similar approaches have been widely used in comparative nonprofit research to establish baseline knowledge of sector size, distribution, and functional orientation, particularly in developing and transition economies (Salamon et al., 2010; Puka, 2018).

RESULTS AND DISCUSSION

This section presents and interprets the empirical findings derived from the Census of Economic Establishments (CEE) 2023/2024. The results are descriptive in nature but are discussed in light of socio-economic structures, nonprofit economic theory, and institutional dynamics in order to assess the economic positioning of civil society organizations (CSOs) in Morocco.

Institutional and Policy Context of Civil Society Organizations

The expansion and functional orientation of Moroccan associations must be understood within the country's regulatory and policy framework. Civil society organizations are primarily governed by the Dahir n° 1-58-376 on the right of

association, which, despite successive amendments, continues to subject associations to administrative oversight. At the same time, public policies — most notably the National Initiative for Human Development (INDH) — have actively promoted associations as partners in the delivery of development programs.

From an institutional perspective, this duality has shaped both the growth and the behavior of CSOs. Associations are encouraged to operate in development-oriented fields such as education, social services, and local infrastructure, where they complement public action and compensate for market shortcomings. Economically, this arrangement allows the state to extend service provision while mobilizing local knowledge and reducing implementation costs. However, it also creates structural dependence on public funding and administrative approval, which may limit organizational autonomy and long-term sustainability.

The Moroccan case thus illustrates a broader policy tension observed in many developing and semi-authoritarian contexts: civil society is simultaneously empowered as a service provider and constrained as an autonomous actor. Addressing this contradiction requires not only expanding financial support, but also simplifying administrative procedures, enhancing transparency-based accountability mechanisms, and recognizing associations as economic institutions rather than merely auxiliary policy instruments.

Spatial Distribution and Regional Disparities of Associations

The CEE 2023/2024 identifies 27,481 nonprofit associations operating in independent premises across Morocco. As shown in Figure 1, these organizations are unevenly distributed across the country's regions. Souss-Massa (15.7%) and Marrakech-Safi (15.0%) together account for nearly one-third of all associations, followed by Casablanca-Settat (12.8%) and Rabat-Salé-Kénitra (10.8%). In contrast, sparsely populated southern regions such as Laâyoune-Sakia El Hamra (0.9%) and Dakhla-Oued Eddahab (0.3%) host relatively few associations.

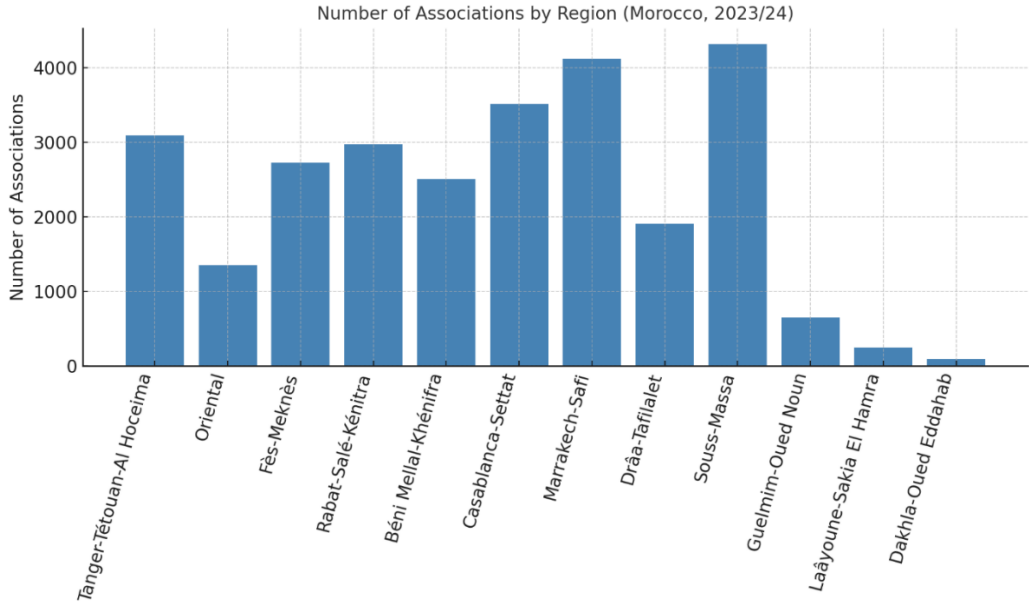


Figure 1. Regional Distribution of Associations in Morocco

Source: CEE 2023/2024

This spatial pattern closely reflects Morocco’s socio-economic geography. Regions with larger populations, higher levels of urbanization, and stronger economic activity tend to sustain denser associative networks. This finding is consistent with international evidence showing that CSO density correlates positively with demographic scale, institutional infrastructure, and income levels. From this perspective, the concentration of associations in metropolitan and economically dynamic regions is not surprising.

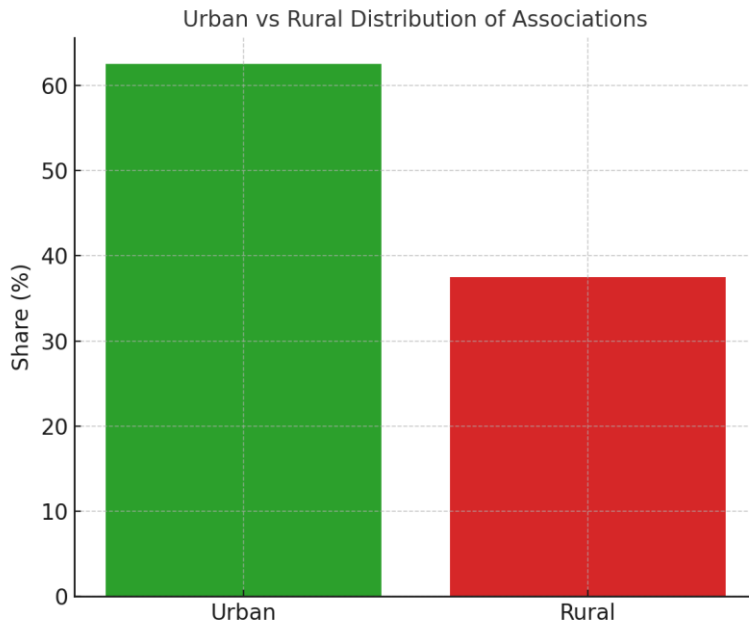


Figure 2. Urban-Rural Distribution of Associations in Morocco

Source: CEE 2023/2024

At the same time, the data reveal a compensatory dynamic. As illustrated in Figure 2, while 62.5% of associations are located in urban areas, a substantial 37.5% operate in rural zones. In regions such as Béni Mellal-Khénifra and Drâa-Tafilalet, rural associations account for more than half of the regional total. This suggests that associative activity does not merely follow economic prosperity but also responds to development needs, filling gaps where public service provision and market access are limited.

From a local development perspective, this territorial embeddedness implies that CSOs contribute to reducing spatial inequalities by delivering basic services, supporting local initiatives, and fostering social inclusion in disadvantaged areas. Similar spatial configurations have been documented in other developing and transition economies, where nonprofits combine urban concentration with deep rural engagement.

Fields of Activity and Functional Specialization

The sectoral distribution of associations further highlights their economic and social orientation. According to the CEE data presented in Figure 3, Moroccan associations are predominantly active in development and housing (27.9%),

education and research (26.2%), and culture, sport, and leisure (22.5%). Smaller shares operate in social services and philanthropy (13.5%), health (3.3%), religious activities (2.0%), environment (0.8%), and human rights or political advocacy (1.9%).

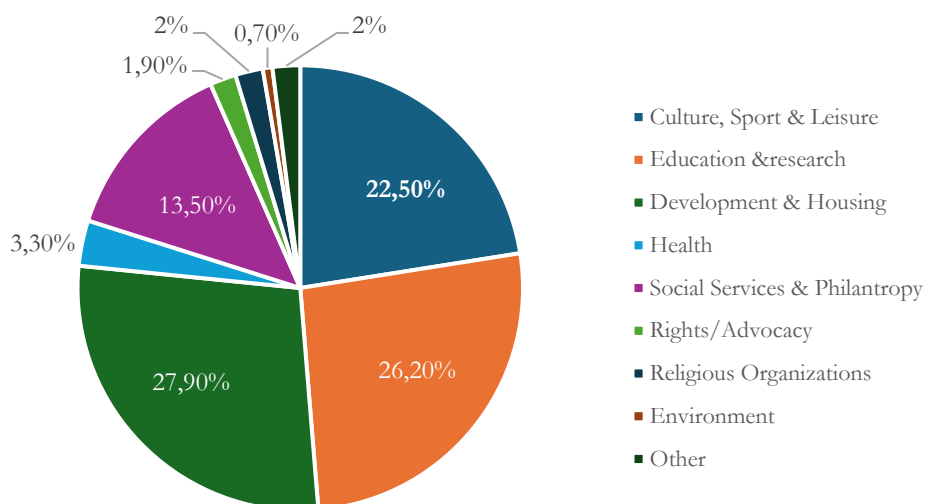


Figure 3. Associations in Morocco by Field of Activity

Source: CEE 2023/2024

This functional profile reflects both policy incentives and structural demand. Development and education-oriented associations align closely with national priorities and donor-supported programs, particularly under the INDH framework. From a nonprofit economics perspective, these sectors correspond to areas characterized by market and government failure, where nonprofit provision is most likely to emerge due to high social demand and limited profitability.

The relatively strong presence of cultural and sport associations underscores their role in social integration, youth engagement, and community cohesion. Although often overlooked in economic analyses, such activities contribute indirectly to human capital formation and social stability. Conversely, the limited representation of advocacy-oriented associations is consistent with the institutional constraints discussed earlier, reinforcing the tendency toward service delivery rather than political mobilization.

Associations as Economic Actors

Although legally nonprofit, Moroccan associations generate tangible economic effects. First, they create employment opportunities for teachers, trainers, social workers, coaches, and administrative staff, particularly in education, development, and socio-cultural sectors. While the CEE does not provide employment figures, the scale of the sector—representing 2.1% of all national establishments—suggests a non-negligible labor market presence.

Second, associations stimulate local economies through project implementation. Under public programs such as the INDH, they manage funds for literacy initiatives, women's cooperatives, micro-projects, and local infrastructure. These activities generate both direct income for beneficiaries and indirect multiplier effects through local procurement and service demand.

Third, associations contribute to long-term economic development by investing in human capital. Training, literacy, and youth-oriented programs enhance skills and employability, particularly in regions and social groups underserved by the formal economy. Even in the absence of precise financial data, the sectoral and territorial patterns observed indicate that CSOs function as embedded economic institutions rather than purely social actors.

Nevertheless, the economic contribution of associations remains statistically under-documented. Fragmented financial reporting and the absence of nonprofit satellite accounts limit visibility in national economic statistics. This reinforces the importance of establishment-based mapping as a foundational step toward more comprehensive measurement.

Synthesis: Developmental and Institutional Implications

Taken together, the results show that Moroccan civil society organizations are structurally aligned with both national development strategies and local socio-economic needs. Their spatial distribution mirrors demographic and economic patterns while also revealing a compensatory role in disadvantaged territories. Their functional specialization reflects classic nonprofit dynamics, concentrating in labor-intensive and socially essential sectors.

Beyond mapping, the analysis demonstrates that the associative sector occupies a hybrid position: it acts as a development partner, an employer, and a provider of public goods, while remaining institutionally constrained. Recognizing and addressing this duality is essential if CSOs are to fully contribute to inclusive and territorially balanced economic development.

CONCLUSION AND DIRECTIONS FOR FUTURE RESEARCH

This study has provided a structured analysis of civil society organizations in Morocco using data from the Census of Economic Establishments (CEE) 2023/2024. By mapping the size, spatial distribution, and fields of activity of nonprofit associations, the paper contributes new empirical evidence to a literature that has largely emphasized political and social dimensions while underexploring economic aspects.

The findings demonstrate that Moroccan associations, although representing a modest share of the national establishment base, are deeply embedded in the country's development landscape. Their territorial distribution reflects both demographic and economic structures and a compensatory response to regional inequalities, with a significant presence in rural and disadvantaged areas. Functionally, associations are concentrated in development, education, and socio-cultural activities—sectors characterized by high social demand, labor intensity, and long-term human capital effects.

From an economic perspective, the analysis suggests that civil society organizations operate as embedded economic institutions rather than peripheral social actors. Through employment generation, project-based spending, and investment in skills and social inclusion, associations contribute to local economies and support inclusive development, even though their financial and employment impacts remain statistically under-documented. This gap highlights the limitations of existing national accounting frameworks in capturing the economic role of the nonprofit sector.

The study also underscores a central institutional tension in Morocco's civil society landscape. While public policies — particularly the National Initiative for Human Development — have expanded opportunities for associations to act as development partners, regulatory constraints and administrative dependence continue to shape their autonomy and sustainability. Addressing this contradiction requires policy approaches that go beyond funding expansion to include regulatory simplification, transparency-based accountability, and greater recognition of CSOs as autonomous economic actors.

Several avenues for future research emerge from this analysis. First, distinguishing active from inactive associations would allow for a more accurate assessment of operational capacity. Second, integrating employment and financial data through the development of a satellite account for the social and solidarity economy would significantly enhance measurement of economic contribution. Third, sector-

specific and regional case studies could deepen understanding of how different types of associations generate socio-economic outcomes at the local level. By combining establishment-based mapping with theoretical interpretation, this study lays the groundwork for more systematic and comparative analyses of civil society's economic role in Morocco and beyond. It thus invites policymakers and researchers alike to reconsider civil society not only as a social or political sphere, but as a meaningful component of national and regional development dynamics.

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