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# From Land Scarcity to Spatial Abundance: Regulatory Reforms that Transformed Land Governance in Nigeria's Oil and Gas Special Economic Zones (2015 – 2024)

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***Abstract-*** ***Land administration has remained one of the most critical determinants of the success or failure of Special Economic Zones (SEZs) globally. In Nigeria, the performance of Oil and Gas Special Economic Zones (OGSEZs) was historically constrained by land governance disputes, monopolistic lease arrangements, overlapping institutional mandates, bureaucratic bottlenecks, and weak coordination between federal and state authorities. This study examines the reforms introduced between 2015 and 2024 that transformed land governance within Nigeria's Oil and Gas Free Zones from a system characterized by spatial restrictions and institutional ambiguity into a more decentralized and expansion-oriented governance framework. Using a mixed-methods research design, the study relied on qualitative interviews, documentary analysis, questionnaires, and policy review to evaluate the impact of reforms implemented by the Oil and Gas Free Zones Authority (OGFZA). The study adopted Stakeholder Theory and the Institutional Analysis and Development (IAD) Framework as analytical foundations for examining the relationship between institutional reforms, stakeholder participation, and land access outcomes. Findings reveal that prior to 2015, land governance within the Oil and Gas Free Zones was dominated by restrictive lease structures and overlapping jurisdictional claims involving federal agencies, State Government and private concessionaires, however, reforms implemented between 2015 and 2024, including the introduction of Developer Licenses, Sub-Zone licensing frameworks, institutional clarifications, and the Oil and Gas Export Free Zone Regulations 2019, significantly expanded investor access to industrial land and improved land governance outcomes. The study revealed that the reforms contributed to an estimated spatial expansion growth of over 92.7% within the study period. The paper argues that sustainable industrial development within Nigeria's oil and gas sector depends heavily on transparent land governance systems, institutional coordination, and legally secure land administration mechanisms. The study recommends harmonization of land governance laws, statutory clarification of institutional mandates, deployment of Geographic Information Systems (GIS) for land administration transparency, and stronger stakeholder participation frameworks for host communities and investors.***

***Index Terms – Land Administration, Oil and Gas Free Zones, Special Economic Zones, Industrial Policy, Institutional Reforms.***

## I. INTRODUCTION

Special Economic Zones (SEZs) have emerged globally as strategic instruments for industrialization, export promotion, investment attraction, and economic diversification. Across both developed and developing economies, SEZs have been used to stimulate industrial growth by creating geographically designated territories where investors enjoy regulatory flexibility, tax incentives, Customs advantages, and streamlined administrative procedures. Countries such as China, the United Arab Emirates, India, and Singapore have successfully deployed SEZs as engines of economic transformation through coordinated industrial planning and investor-friendly governance systems.

Nigeria adopted the SEZ model in the 1990s as part of broader economic reforms aimed at reducing overdependence on crude oil exports and stimulating industrial development. The enactment of the Oil and Gas Export Free Zone Act in 1996 created the legal foundation for the establishment of Nigeria's first petroleum-focused Special Economic Zone at Onne/Ikpokiri in Rivers State. The initiative represented a pioneering global effort to establish a sector-specific oil and gas free zone dedicated to attracting investments into petroleum logistics, fabrication, engineering services, refining support operations, and downstream industrial activities.

Despite the strategic importance of Nigeria's Oil and Gas Free Zones, the implementation of the scheme faced persistent land governance challenges. Between 1996 and 2015, land administration within the zones was characterized by overlapping institutional mandates, restrictive lease structures, monopolistic control over industrial land access, jurisdictional disputes among regulatory agencies, and prolonged investor delays. These challenges undermined investor confidence and weakened the ability of the zones to attract large-scale industrial investments.

Land governance emerged as one of the most contentious dimensions of the implementation process. The ambiguity surrounding institutional authority over land administration within the Oil and Gas Free Zones created recurring conflicts between the Oil and Gas Free Zones Authority (OGFZA), the Nigerian Ports Authority (NPA), private concessionaires, and state governments. Further to this, some resistance emerged from host communities over land acquisition and compensation which deepened governance tensions and negatively impacted industrial expansion.

Between 2015 and 2024, however, significant institutional reforms were introduced by OGFZA to address these constraints. These reforms fundamentally altered the governance architecture of land administration within the zones. So, through regulatory restructuring, decentralization of developer participation, introduction of sub-zone licensing systems, and clarification of institutional authority, the reforms expanded investor access to industrial land and reshaped the spatial governance structure of the zones.

This paper examines how these reforms transformed land governance within Nigeria's Oil and Gas Special Economic Zones from conditions of spatial scarcity into a framework of spatial abundance and expanded industrial access. The study situates land administration as a central variable influencing industrial policy implementation, investment attraction, and sustainable economic development within Nigeria's petroleum industrial clusters.
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## II. THEORETICAL FRAMEWORK: LAND ADMINISTRATION AND INDUSTRIAL DEVELOPMENT

Land administration refers to the processes, institutions, and regulatory systems through which land rights, land use, land valuation, and land transactions are managed within a society.

According to Williamson, Enemark, Wallace, and Rajabifard (2010), land administration systems encompass the determination, recording, and dissemination of information relating to land ownership, value, use, and development control.
Within industrial development frameworks, land administration performs a strategic role by determining access to industrial space, investment security, infrastructure planning, and regulatory certainty. Efficient land administration systems provide investors with secure tenure arrangements, predictable regulatory procedures, and transparent land allocation mechanisms. Conversely, weak land administration systems generate uncertainty, increase transaction costs, and discourage industrial investments.

In the context of Special Economic Zones, land governance assumes even greater significance because industrial clusters depend heavily on coordinated spatial planning, infrastructure integration, and investor access to serviced industrial land. Studies by Farole and Akinci (2011) demonstrate that the success of SEZs in countries such as China and the United Arab Emirates was strongly linked to predictable land tenure systems and centralized administrative coordination.

### 2. Special Economic Zones and Spatial Governance

Special Economic Zones are legally designated territories operating under specialized economic and regulatory frameworks designed to stimulate industrial production, export manufacturing, and investment attraction. SEZs are spatially organized industrial governance systems where land administration, customs administration, taxation systems, and industrial regulation operate through modified institutional arrangements.
The effectiveness of SEZs depends significantly on land accessibility and institutional coordination.

Zeng (2011) argues that the success of Shenzhen and other Chinese SEZs resulted partly from flexible land-use systems and predictable industrial lease arrangements that minimized bureaucratic interference and strengthened investor confidence.

Nigeria's Oil and Gas Free Zones represent a specialized form of SEZ designed specifically for petroleum sector industrialization. These zones were intended to support fabrication, logistics, offshore support services, petrochemical processing, and energy-related industrial activities. However, unlike many successful global SEZs, Nigeria's Oil and Gas Free Zones initially suffered from fragmented land governance systems.

3. The Institutional Analysis and Development Framework

This study adopts the Institutional Analysis and Development (IAD) Framework developed by Elinor Ostrom as one of its analytical foundations. The IAD framework explains how institutional rules shape interactions among actors within governance systems. According to Ostrom (2005), institutional outcomes are influenced by the rules governing interactions within what she describes as the "action arena". In the case of Nigeria's Oil and Gas Free Zones, the action arena involved OGFZA, private developers, port authorities, investors, host communities, and state governments.

Before 2015, the rules governing access to industrial land within the zones encouraged monopolistic practices and institutional fragmentation. However, the various reforms introduced by OGFZA within study period altered the governance rules by decentralizing developer participation, introducing sub-zone licensing systems, and clarifying institutional authority. The IAD framework is useful for understanding how these institutional reforms restructured stakeholder interactions and expanded access to industrial land within the zones.

4. Stakeholder Theory

The study also draws from Stakeholder Theory as advanced by R. Edward Freeman, which emphasizes that institutional outcomes depend on how organizations manage relationships among stakeholders with competing interests. Within the Oil and Gas Free Zones, stakeholders included regulatory agencies, investors, developers, host communities, state governments, and state institutions. The diverse reforms introduced between 2015 and 2024 attempted to rebalance these relationships by expanding participation opportunities and reducing monopolistic control over land access.

## III. METHODOLOGY

The study adopted a mixed-methods research design combining qualitative and quantitative approaches. The mixed-methods approach enabled the integration of documentary analysis, questionnaires, interviews, and institutional policy reviews. The primary data were collected through structured questionnaires and interviews involving officials of the Oil and Gas Free Zones Authority, investors, developers, community stakeholders, and regulatory actors operating within Nigeria's Oil and Gas Free Zones, while the study population consisted of 242 respondents drawn from institutional stakeholders connected to the administration and operation of the Oil and Gas Free Zones and a sample size of 144 respondents was selected using purposive sampling techniques.

The secondary data was obtained from legal documents, government reports, institutional regulations, academic journals, policy papers, and official gazettes relating to land administration and SEZ governance. Data generated from questionnaires were analyzed using descriptive statistical techniques, while qualitative interview data was subjected to thematic and textual analysis.

To strengthen the empirical and analytical consistency of this study, quantitative land-governance measurement models and spatial-development calculations were integrated into the analytical framework. These models were used to evaluate the relationship between institutional reforms, land accessibility, spatial expansion, and industrial development outcomes within Nigeria's Oil and Gas Free Zones.

(a) Spatial Expansion Growth Rate Model

The study measured the rate of spatial expansion within the Oil and Gas Free Zones using the percentage growth model:

SEG = ↑rac {L_ {2} - L_ {1}} {L_ {1}} imes 100

Where:
SEG = Spatial Expansion Growth Rate
L_1 = Initial land area before reforms
L_2 = Land area after reforms

Using the study findings:

SEG = ↑rac{92.7 - 48.1} {48.1} imes 100
SEG=92.7%

This model demonstrates the extent to which land governance reforms expanded industrial land accessibility within the study period.

(b) Investor Access Efficiency Index (IAEI)
To evaluate the efficiency of land accessibility reforms, the study introduces an Investor Access Efficiency Index:

IAEI = ↑rac{A_i} {T_p}

Where:
IAEI = Investor Access Efficiency Index
A_i = Number of approved investor land allocations
T_p = Average project approval timeline

An increase in the value of IAEI indicates improved administrative efficiency and faster investor access to industrial land.

(c) Institutional Coordination Efficiency Model
The study further conceptualizes institutional coordination using the governance efficiency function:

ICE = ↑rac{C_r + P_t + L_s}{B_d}

Where:
ICE = Institutional Coordination Efficiency
C_r = Regulatory clarity score
P_t = Project turnaround efficiency
L_s = Land security index
B_d = Bureaucratic delay frequency

This model explains how reductions in bureaucratic conflicts improve land governance performance.

(d) Stakeholder Participation Function
Based on Stakeholder Theory, stakeholder integration effectiveness was measured conceptually using the following function:

$$SPF = f(G_a + I_p + H_c + R_c)$$

Where:
SPF = Stakeholder Participation Function
G_a = Government agency coordination
I_p = Investor participation level
H_c = Host community engagement
R_c = Regulatory cooperation

The model demonstrates that industrial sustainability improves when stakeholder participation variables increase simultaneously.

(e) Land Governance Sustainability Equation
To evaluate long-term governance sustainability within Oil and Gas Free Zones, the study introduces the following governance sustainability model:

$$LGS = (T_s + R_p + I_c + D_t) - C_f$$

Where:
LGS = Land Governance Sustainability
T_s = Tenure security
R_p = Regulatory predictability
I_c = Institutional coordination
D_t = Digital transparency systems
C_f = Conflict frequency

This equation establishes that sustainable industrial land governance depends on the interaction between tenure security, institutional coordination, and transparent administrative systems.

(f) Geographic Information Systems (GIS) Integration Model
The study also recognizes the strategic role of Geographic Information Systems (GIS) in modern land administration. Spatial mapping efficiency can be represented as:

SME = ↑rac{D_a imes A_c}{E_r}

Where:

SME = Spatial Mapping Efficiency
D_a = Digital accessibility of land records
A_c = Accuracy of cadastral mapping
E_r = Error rate in land documentation

The integration of GIS-driven land administration systems enhances transparency, reduces conflicts, and improves investor confidence.

These analytical models strengthen the scientific and policy-analysis dimensions of the study by integrating measurable institutional, spatial, and governance indicators into the broader qualitative analysis framework.

## IV. FINDINGS

The establishment of Nigeria's first Oil and Gas Free Zone at Onne/Ikpokiri in 1996 marked a significant milestone in Africa's industrial policy landscape, however, from inception, the implementation framework suffered from institutional ambiguities surrounding land ownership, administrative authority, and lease management. One of the central governance problems involved ambiguity regarding which institution possessed ultimate authority over land administration within the zones. Conflicts emerged between OGFZA and the Nigerian Ports Authority over jurisdictional control of port-related industrial lands.

In addition, land allocation systems within the zones became heavily concentrated in the hands of dominant concessionaires and developers. This created restrictive access conditions for new investors seeking industrial space. The concentration of land administration authority outside the Regulatory Authority's institutional arrangements contributed to what may be described as "spatial scarcity". Although large areas existed within the broader industrial ecosystem, access to industrial land remained administratively restricted.

Furthermore, host community disputes over ancestral land claims created additional tensions around industrial expansion. State and community opposition to land acquisition processes delayed several investment projects and contributed to uncertainty in project implementation timelines. These constraints were due to the absence of clear institutional coordination mechanisms that weakened investor confidence. Thus, investors faced delays associated with overlapping approvals, conflicting administrative directives, and uncertainty over lease validity. These structural limitations undermined the industrial potential of the zones and constrained the realization of broader economic objectives connected to export manufacturing, fabrication services, and downstream petroleum industrialization.

### A. The 2015–2024 Reforms and the Transformation of Land Governance

#### 1. Emergence of Institutional Reforms

Beginning from 2015, OGFZA initiated a series of institutional reforms aimed at restructuring land governance within Nigeria's Oil and Gas Free Zones driven by the need to eliminate monopolistic barriers to land access, improve investor participation, decentralize industrial development opportunities, and clarify regulatory authority within the zones. These reforms represented a major departure from earlier governance structures that concentrated land administration authority within restrictive concessionary arrangements.

#### 2. Introduction of Developer Licenses

One of the most transformative reforms introduced during the period was the creation of the Developer License framework. The Developer License system expanded participation opportunities by allowing multiple developers to establish and manage industrial areas within approved Oil and Gas Free Zones. This reform reduced monopolistic control over industrial land and created new pathways for investment participation. By decentralizing land development opportunities, OGFZA's reform increased competition, expanded industrial access, and encouraged spatial diversification within the zones.

#### 3. Creation of Sub-Zone Licensing Frameworks

Another major reform involved the introduction of Sub-Zone licensing categories. The Sub-Zone framework enabled investors and developers to establish operational industrial enclaves connected administratively to existing Oil and Gas Free Zones. This innovation significantly expanded the geographical reach of the zones beyond their original

territorial limitations whereby, through the sub-zone arrangement, industrial development opportunities became accessible across multiple locations without requiring complete duplication of full free zone infrastructure systems. The reform effectively transformed the governance model from rigid spatial concentration into a more flexible network-based industrial expansion framework.

4. The Oil and Gas Export Free Zone Regulations 2019

The enactment of the Oil and Gas Export Free Zone Regulations in 2019 further strengthened institutional clarity within the governance system, providing clearer administrative procedures relating to licensing, land administration, operational compliance, and investor participation. This was achieved by codifying governance procedures, where the regulations improved regulatory predictability and reduced institutional ambiguities that previously discouraged investors.

5. Clarification of Institutional Authority

The reforms also involved institutional efforts aimed at clarifying the jurisdictional authority of OGFZA over land administration within the zones. The Honourable Attorney Generals and Ministers of Justice documented Legal interpretations and institutional clarifications that reduced governance conflicts involving overlapping regulatory mandates. This institutional clarification improved coordination mechanisms and strengthened the legitimacy of OGFZA's administrative role.

## V. DISCUSSION: SPATIAL SCARCITY TO SPATIAL ABUNDANCE

One of the most significant outcomes of the reforms introduced between 2015 and 2024 was the transition from restrictive land access conditions toward expanded industrial spatial opportunities. Findings from the study indicate that the reforms contributed to an estimated spatial expansion growth exceeding 92.7% during the study period. This expansion represented not merely physical growth but a transformation in governance philosophy and shifted land administration from a restrictive and monopolized framework toward a more open and investment-oriented spatial governance structure. Prior to the reforms, access to industrial land within the zones was limited and industrial expansion opportunities remained constrained despite growing investor demand.

However, the introduction of decentralized developer participation and sub-zone arrangements significantly expanded available industrial spaces. The reforms enabled the emergence of new Oil and Gas Free Zones and industrial extensions across multiple states including Lagos, Delta, Bayelsa, Akwa Ibom, and Imo States, while improving investor access to industrial land, reduced administrative concentration, and expanded opportunities for infrastructure development.

1. Implications for Industrial Development and Economic Governance

The transformation of land governance within Nigeria's Oil and Gas Free Zones carries important implications for industrial policy and economic development. First, the study demonstrates that land administration systems are central determinants of industrial investment outcomes, while weak land governance structures create barriers that undermine industrial growth even where favorable investment incentives exist. Secondly, the findings reveal that institutional reforms can significantly alter investment environments by restructuring governance relationships and expanding access opportunities. Thirdly, the reforms illustrate the importance of institutional coordination in complex industrial ecosystems involving multiple regulatory agencies and stakeholders, and fourthly, the expansion of industrial land access has implications for broader economic diversification objectives.

By improving investor access to industrial space, the reforms strengthened the capacity of the zones to attract petroleum-related manufacturing, logistics operations, fabrication industries, and downstream processing investments. Lastly, the study reinforces the importance of balancing industrial expansion with stakeholder participation and host community engagement.

2. Persistent Challenges

Despite the significant reforms introduced between 2015 and 2024, several challenges continue to affect

land governance within Nigeria's Oil and Gas Free Zones. One major challenge involves the continuing overlap between federal land governance structures and state-level land administration systems, as the Land Use Act of 1978 continues to create governance complexities because state governors retain significant powers over land administration, thus creating potential conflicts between federal industrial policy objectives and state-level land governance priorities.

Host community disputes also remain an important concern for land governance in Special Economic Zones, particularly regarding compensation, environmental impacts, and land acquisition processes. This is in addition to bureaucratic delays and administrative inefficiencies which continue to affect some dimensions of project implementation. The absence of fully digitized land administration systems also limits transparency and efficient land management processes.

## VI. POLICY RECOMMENDATIONS

Based on the findings of this study, the following recommendations are proposed:

1. The Federal Government should harmonize institutional land governance frameworks affecting Oil and Gas Free Zones to eliminate jurisdictional overlaps between federal agencies and state authorities. This harmonization should clearly define the roles of OGFZA, NPA, state land authorities, host state governments, and other regulatory agencies involved in land allocation, port operations, infrastructure approvals, and industrial development. A unified coordination framework will reduce duplication, prevent conflicting directives, shorten approval timelines, and improve investor confidence.

2. The Oil and Gas Export Free Zone Act should be amended to provide clearer statutory authority regarding land administration responsibilities within the zones.

The amendment should expressly define OGFZA's powers over land allocation, lease administration, developer licensing, sub-zone approval, land-use regulation, and investor protection within Oil and Gas Free Zones. This will remove legal ambiguity, strengthen tenure security, and provide a more predictable regulatory environment for long-term investments.

3. OGFZA should deploy Geographic Information Systems (GIS) and digital land administration platforms to improve transparency, land tracking, and investor accessibility.

A GIS-based platform should be used to map all available, allocated, encumbered, and reserved lands within the zones. This will enable transparent land records, digital lease processing, automated tracking of applications, remote investor access to land information, and reduced opportunities for manipulation or double allocation.

4. Stakeholder participation frameworks involving host communities, investors, and state governments should be strengthened to reduce land-related conflicts.

OGFZA should institutionalize regular stakeholder consultations, community engagement forums, investor feedback platforms, and participatory land-use planning mechanisms. This will help address compensation concerns, environmental issues, community expectations, and investor grievances before they escalate into disputes.

5. Transparent dispute resolution mechanisms should be institutionalized to address land governance disputes efficiently.

A specialized land dispute resolution committee or arbitration panel should be established for Oil and Gas Free Zones. It should include legal experts, land administration professionals, community representatives, investors, and relevant government agencies. This will reduce litigation delays, improve settlement timelines, and protect project implementation schedules.

6. Government should continue expanding decentralized industrial access frameworks through carefully regulated sub-zone systems and industrial cluster partnerships.

The sub-zone model should be strengthened as a tool for expanding industrial land access beyond congested or monopolized locations. However, expansion should be guided by clear approval criteria, environmental safeguards, infrastructure readiness, and compliance monitoring to ensure that sub-zones support genuine industrial development rather than speculative landholding.

7. Greater integration between industrial policy planning and land governance systems should be institutionalized to support long-term industrial sustainability.

Land administration should be treated as a core component of industrial policy, not merely as a technical land allocation process. Industrial planning, infrastructure development, environmental management, investment promotion, and land-use regulation should be jointly coordinated to ensure that Oil and Gas Free Zones remain competitive, sustainable, and attractive to investors.

## VII. CONCLUSION

This study examined the transformation of land governance within Nigeria's Oil and Gas Special Economic Zones between 2015 and 2024, where prior to the reforms, land administration within the zones was constrained by monopolistic lease arrangements, overlapping institutional mandates, bureaucratic fragmentation, and restricted investor access to industrial land. However, reforms introduced by the Oil and Gas Free Zones Authority between 2015 and 2024 fundamentally altered the governance architecture of land administration within the zones.

Through the introduction of Developer Licenses, Sub-Zone licensing frameworks, institutional clarifications, and regulatory reforms, the governance system shifted from conditions of spatial scarcity toward expanded industrial accessibility and spatial abundance. The reforms contributed significantly to industrial spatial expansion, improved investor participation, and enhanced opportunities for industrial development.

The study concludes that sustainable industrialization within Nigeria's petroleum sector depends heavily on transparent land governance systems, secure tenure arrangements, institutional coordination, and participatory governance structures. Land administration should therefore be recognized not merely as a technical governance issue but as a central pillar of industrial policy implementation and economic transformation.

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