

# Petroleum Business Development Due Diligence Training Course

30 May – 3 June 2027
Geneva

AGILE LEADERS
Training Center

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## Overview

Petroleum Business Development Due Diligence Training Course is a one-week intermediate course for commercial, investment, finance, legal, technical-assurance, and asset-evaluation functions who leave with a Petroleum Opportunity Due Diligence File. Participants connect data-room control, petroleum asset evaluation, reserves evidence, facilities, fiscal and licence terms, valuation, environmental and social risks, counterparties, red flags, and recommendations. The course turns multidisciplinary evidence into traceable opportunity decisions. Agile Leaders Training Center presents petroleum business due diligence.

## Who Should Attend

- Business-development functions responsible for screening petroleum opportunities and partnerships
- Commercial and investment functions responsible for deal assumptions and recommendations
- Technical functions responsible for subsurface, reserves, facilities, and integrity evidence
- Finance and valuation functions responsible for cash-flow cases and sensitivities
- Legal and fiscal functions responsible for rights, obligations, licences, and transaction terms
- Assurance functions responsible for environmental, social, HSE, and counterparty review

The course assumes participants already review business cases, technical reports, contracts, financial models, or risk evidence at work, and it leaves out specialist reserve certification, legal opinions, tax advice, and transaction execution.

## Departments and Industries

The course supports departments and industries that evaluate resource-based assets, partnerships, and investment propositions.

- Petroleum business development and corporate strategy
- Exploration, production, reservoir, and facilities functions
- Energy investment, project finance, and transaction teams
- Legal, commercial, fiscal, and contract functions
- Environmental, social, HSE, integrity, and technical assurance
- Geothermal and other subsurface resource-development organizations

## Learning Objectives

By the end of this course, participants will be able to:

- Build a risk-based petroleum due diligence scope
- Analyze subsurface, reserves, facilities, and integrity evidence
- Evaluate licence, fiscal, commercial, and counterparty terms
- Apply valuation sensitivities to opportunity assumptions
- Diagnose environmental, social, HSE, and decommissioning gaps
- Prioritize red flags and build a traceable recommendation

## Course Agenda

### Day 1: Frame the Opportunity Review

- Opportunity Mandate and Decision-Criteria Canvas
- Petroleum Value-Chain and Transaction-Type Map
- Risk-Based Due Diligence Scope Matrix
- Data-Room Index and Document-Control Register
- Evidence Request, Ownership, and Issue-Tracking Protocol

### Day 2: Test Technical and Asset Evidence

- Subsurface Data Quality and Uncertainty Checklist
- Reserve Category and Development-Status Evidence Map
- Production Forecast and Decline-Assumption Review Sheet
- Facilities Capacity, Condition, and Integrity Screen
- Capital, Operating, Abandonment, and Schedule Basis Register

### Day 3: Review Rights and Commercial Terms

- Licence, Contract, and Participating-Interest Rights Matrix
- Fiscal Terms and Government-Take Driver Map
- Sales, Transport, Processing, and Market-Access Checklist
- Counterparty, Beneficial-Ownership, and Conflict Screen
- Obligation, Consent, Change-of-Control, and Liability Register

### Day 4: Integrate Value and Risk

- Discounted Cash-Flow Assumption Bridge
- Price, Volume, Cost, Schedule, and Fiscal Sensitivity Grid
- Environmental and Social Due Diligence Gap Assessment
- HSE, Integrity, Decommissioning, and Legacy-Liability Screen
- Red-Flag Severity and Risk-Adjusted Value Matrix

## Day 5: Practice the Investment Recommendation

- Suggested Exercise: Triage a Petroleum Data Room
- Suggested Exercise: Challenge a Reserve and Development Case
- Suggested Exercise: Test Fiscal and Valuation Sensitivities
- Suggested Exercise: Rank Red Flags and Mitigation Conditions
- Capstone Exercise: Complete the Petroleum Opportunity Due Diligence File

## Practical Exercises

The course uses suggested activities to convert multidisciplinary evidence into a controlled petroleum opportunity recommendation.

- Suggested activity: define scope, materiality, evidence ownership, and data-room requests for a farm-in or asset acquisition.
- Suggested activity: reconcile reserve, production, facility, cost, schedule, and licence assumptions across source documents.
- Suggested activity: test value sensitivities and connect environmental, social, HSE, integrity, and counterparty gaps to conditions.
- Suggested activity: present a go, conditional-go, or no-go recommendation with evidence, uncertainties, red flags, and actions.

## FAQs

### Who suits petroleum business due diligence training, and what does it assume?

Petroleum business due diligence training suits commercial, investment, technical, finance, legal, strategy, and assurance functions. It assumes participants already work with business cases, technical reports, contracts, financial models, or risk records.

### How does petroleum business due diligence differ from financial due diligence?

Petroleum business due diligence integrates subsurface, reserves, facilities, licences, fiscal terms, valuation, HSE, environmental and social risks, counterparties, and liabilities. Financial due diligence concentrates more narrowly on financial statements, earnings, cash flows, debt, and accounting evidence.

### What evidence matters in petroleum asset evaluation?

Petroleum asset evaluation relies on traceable subsurface data, reserve classification, production history, development assumptions, facility condition, capital and operating costs, schedules, rights, obligations, fiscal terms, liabilities, and market access.

## How are petroleum due diligence red flags prioritized?

Petroleum due diligence red flags are prioritized by evidence strength, materiality, probability, consequence, value impact, remedy, timing, ownership, and whether the issue requires a condition, price adjustment, protection, further work, or rejection.

## How does petroleum due diligence support a business-development decision?

Petroleum due diligence supports the decision by linking assumptions, evidence gaps, sensitivities, liabilities, counterparty concerns, and mitigation conditions to a documented go, conditional-go, or no-go recommendation.

## Conclusion

Participants take back a Petroleum Opportunity Due Diligence File containing scope, evidence registers, technical and commercial tests, valuation sensitivities, red flags, and recommendation logic. The file creates one traceable view across specialist reviews. It helps teams challenge assumptions, assign further work, and state conditions before committing to a petroleum opportunity.