



CLEAN TRANSPORTATION

ELIGIBILITY CRITERIA AND DOCUMENTATION REQUIREMENTS

THIS DOCUMENT SETS OUT:

1. How an ANZ Business Green Loan can be used to finance, or refinance, products or projects related to clean transportation solutions
2. What you can apply for (qualifying expenses)
3. The documentation and evidence you'll need to provide at each stage – on application, on completion (if applicable), and ongoing during the term of the loan.

1. WHAT CAN AN ANZ BUSINESS GREEN LOAN BE USED FOR?

An ANZ Business Green Loan can be used to finance, or refinance, costs related to the purchase and/or installation of eligible clean transport products, including:

- battery electric vehicles, vessels and self-propelled equipment,
- hybrid vehicles that emit less than 50g CO₂e/km,
- non-motorised vehicles, and
- charging points that support environmentally friendly transport solutions.

See Appendix 1 for more information, including details of eligible products.

If you're applying to refinance, projects must have been completed within 24 months of the date of your ANZ Business Green Loan application form.

Exclusions

- Products used predominately for personal use, and
- Any other exclusion listed in Appendix 1.

2. WHAT CAN YOU APPLY FOR (QUALIFYING EXPENSES)?

You can apply for:

- Costs related to the purchase of eligible products as set out in Appendix 1.

- The following costs specifically incurred in relation to the installation of charging points for electric vehicles, vessels or aircraft:

- Consulting, planning and consenting
- Site preparation
- Installation
- Labour.

Evidence of qualifying expenses required:

You'll need to provide evidence of the debt to be repaid, or costs to be financed, and evidence of the qualifying expenses in a form we're happy with by way of:

- Invoices that include your business name, and;
- Evidence of the relevant supplier details, and;
- Description of the goods and services provided, or;
- Quantity surveyor or engineers report(s) evidencing the relevant costs incurred.

Evidence must be provided prior to the drawing of your loan or, if you're undertaking a new project where finance will be drawn in instalments, prior to each instalment. Your loan agreement may also state what information you need to provide to us as a condition of each instalment.

3. OTHER DOCUMENTATION AND EVIDENCE REQUIRED

To be eligible (and remain eligible) for an ANZ Business Green Loan you'll need to provide certain other documents and evidence – on application, on completion, and annually during the term of your loan. We've set out below what you need to provide and when.

- **A completed ANZ Business Green Loan application form**
You can get a copy of the application form from your relationship manager. Your application form must include details of the environmental benefits of your project and how this fits with the overall environmental strategy of your business. See the 'expected impacts' column in Appendix 1 below for details of the environmental benefit information you'll need to provide. In some cases, we may need an external consultant to verify the expected environmental benefits of your project at your cost (we'll let you know if this required prior to draw down of your loan).
- **Design phase information** (to be provided along with your application form)
See Appendix 1 below for details of the design phase documentation you'll need to provide.
- **Project completion information**
Evidence that the project has been completed in accordance with the design phase specifications and applicable standards. See the project completion information column in Appendix 1 below for details of the information required.
 - **If you're applying for a new project:** You'll need to provide this information within 90 days of completion of your project.
 - **If you're applying for a completed project:** You'll need to provide this information with your application form. You'll also need to provide us with evidence that your project was completed no more than 24 months prior to submitting your application.
- **Annual reporting**
In some cases, you'll need to provide to us with annual reporting that verifies the ongoing environmental impacts of your project. This information must be provided within 90 days of each anniversary of completion of your project. See the 'Annual reporting requirements' column for details of which products require annual reporting and the form of evidence required.

NEED HELP?

If you need any help or have questions, please contact your relationship manager or call us on 0800 269 249.

IMPORTANT INFORMATION

ANZ Business Green Loans are subject to the terms of a loan agreement. The ANZ Business Green Loan terms will include (among other things) items that must be satisfied before the loan can be drawn, the use of the loan, and information that you will need to provide to us during the term of the loan. All drawdown conditions must be met prior to drawdown. If you don't comply with the ANZ Business Green Loan terms it may result in the loan ceasing to be "green" and any applicable pricing benefits of the loan being green being removed.

This eligibility criteria document is subject to change, non-exhaustive and ANZ may seek additional information or ask you to clarify information you have given to us. ANZ may apply discretion when assessing applications and reserves the right to decline applications even where eligibility criteria is met. ANZ Business Green Loans are only available to ANZ Business customers. ANZ will not finance against specific assets only and suitable other security will be required. Offer is subject to change. ANZ lending and eligibility criteria, terms and conditions and fees apply. The content of this eligibility criteria is correct as of 5 April 2024 and is subject to change.

APPENDIX 1: CLEAN TRANSPORTATION – EVIDENCE REQUIREMENTS

The table below sets out the evidence and information that you'll need to provide depending on your project. This information is subject to change and you'll need to check the eligibility criteria for details of the latest form of evidence required.

*If your project involves more than one product from the below list, your expected impacts can be provided on an aggregated basis. This means you can represent the environmental benefits of the overall project (where the same expected impacts occur across some or all of the products included in your project). However, you will still need to provide the expected impacts information for products where impacts are unable to be aggregated.

Eligible clean transportation products	Expected impacts – information to be included in your ANZ Business Green Loan application*	Design phase information – to be provided with your ANZ Business Green Loan application	Project completion information – required with your application for a completed project or within 90 days of the completion of a new project	Annual reporting requirements
<p>Battery electric vehicles This can include the installation of charging points for electric vehicles</p>	<p>If applicable, previous fuel type and usage (L/pa). For hybrid vehicles g/CO₂e/km. Expected CO₂e Tonnes/pa emissions reduced or avoided.</p>	<p>Make and model. For hybrid vehicles the source of the emissions intensity number needs to be provided.</p>	<p>Confirmation of ownership.</p>	<p>Confirmation of ownership.</p>
<p>Hybrid electric vehicles Exclusions: vehicles that emit greater than 50g CO₂e/km</p>				
<p>Vehicles powered by alternative sources (such as green hydrogen) Exclusions: Vehicles that run on biofuel</p>				
<p>Non-motorised vehicles This includes any equipment (including fleets) used for active mobility (e.g. walking, cycling, e-bikes and e-scooters)</p>				
<p>Battery electric self-propelled equipment</p>				
<p>Battery electric maritime vessels This can include the installation of charging points for electric vessels</p>				
<p>Alternative non fossil fueled power sources for fishing and commercial vessels Exclusions: Power sources that run on biofuel</p>				
<p>Purchase and installation of charging points for electric vehicles, vessels or aircraft Exclusions: systems and infrastructure which are primarily used for the transportation of fossil fuels</p>	<p>Charger capacity (kW).</p>	<p>Design phase documentation prepared by a registered installer, engineer or external consultant acceptable to ANZ showing the project supports achieving the expected impacts. Evidence the design meets the relevant council regulations.</p>	<p>Confirmation from a registered installer, engineer or external consultant acceptable to ANZ that the project has completed in accordance with the design phase specifications.</p>	