

Glossary

ABP	Associated British Ports, a UK ports business providing port facilities and services to shippers and cargo owners at various UK ports .
ACCC	Australian Competition and Consumer Commission, an independent Commonwealth statutory authority. It promotes competition and fair trade in the marketplace to benefit consumers, business and the community in Australia. It also regulates national infrastructure services. Its primary responsibility is to ensure that individuals and businesses comply with the Commonwealth competition, fair trading and consumer protection laws.
Adsteam Marine	Adsteam Marine Ltd, the Australian parent company of Adsteam UK Ltd, a towage operator .
Adsteam	Adsteam UK Ltd, a UK-based towage operator —the target of the acquisition, which this inquiry is concerned with.
APMM	A P Møller-Maersk A/S, the parent company of Svitzer-Wijismuller . It is active in: container shipping and related activities; tanker, offshore and other shipping activities and ferry services and door-to-door transport; oil and gas activities; retail activity (supermarkets and hypermarkets); and other activities (shipyards; production of refrigerated containers and production of plastic articles, a 20 per cent interest in Danske Bank, and aviation, primarily cargo).
ASD tug	Tugs with an azimuthing propeller fitted at the stern are known as azimuth stern drive (ASD) tugs. These are more manoeuvrable than conventional tractor tugs .
BP	Bollard pull, a measure of a tug's pulling and pushing power, assessed in terms of the tonnes of force that a tug can exert on a stationary object (for example, the bollard to which ships are moored).
Bow thrusters	A device fitted to the bow of a ship to provide transverse thrust.
Bulk cargo	Cargo (such as coal, ore, sand or oil) that is carried loose or takes the shape of a bulk carrier's hold.
Bulk carrier/ship	Vessels that transport bulk cargo . Bulk carriers do not have pre-arranged schedules—they are more akin to a charter service.
Carmet	Carmet Tug Company Ltd, a towage operator and the sole towage contractor on the Manchester Ship Canal.
CC	Competition Commission.

Clarkson Brothers	Clarkson Brothers Ltd, a shipping agent .
Containerized cargo	Freight transported in containers (as opposed to bulk cargo).
Container ship	Ship that carries containerized cargoes . Generally will be part of a liner service, with a pre-arranged schedule of port calls.
Core port activities	Activities carried out by a port authority such as planning, providing and allocating port infrastructure such as channels, breakwaters, navigation aids and berths.
Corus	Corus plc—manufactures, processes and distributes metal products as well as providing design, technology and consultancy services. Corus is a ship owner and customer for harbour towage .
Coryton terminal	An owner terminal located on the River Thames and operated by BP.
Crews	Tugboats operate with crews of around three, typically consisting of a master, a mate and an engineer.
Customer terminal	A terminal where a towage operator has separate agreements with each shipping company serving the terminal rather than with the terminal owner.
Deep sea tug	Performs salvage and long ocean tows; more powerful than a harbour tug.
dwt	Tonnes deadweight, the measurement of size of ships. Deadweight is the displacement (the total weight of the loaded vessel) minus the lightship weight (the weight of the unloaded ship). It includes the crew, passengers, cargo, fuel, water and stores.
EBITA	Earnings before interest, taxes and amortization.
Fairplay	Fairplay Towage BV, a German towage operator also involved in deep-sea towage, offshore support and salvage works.
Forth Ports	Forth Ports Plc, a port and towage operator in eight UK ports: Dundee on the Tay Estuary, Tilbury on the Thames and six on the Forth Estuary.
Grupo Boluda	Grupo Boluda Corporacion Maritima, a Spanish-based towage operator .
Harbour towage	Harbour towage is a common term applied to regular inshore assisting and 'push-pull' operations. In general, harbour towage consists of all services necessary to ensure ships' safe arrival and departure to and from ports , and the safe moving of floating objects inside the defined port area.

HKST	Hongkong Salvage and Towage, a towage operator based in Hong Kong.
Humber Tugs	Humber Tugs Ltd, a towage operator set up by Adsteam on the River Humber.
ICL	Independent Container Line Ltd, a ship owner and customer of harbour towage .
J P Knight	J P Knight Ltd, a towage operator based in Scotland.
Kotug	Kotug International BV, a towage operator based in Europe.
Les Abeilles	Les Abeilles SAS, a French-based towage operator .
Lighterage	The loading or unloading of a ship by means of a lighter (barge), especially when shallow waters prevent an ocean-going vessel from approaching a berth, or if berths are unavailable.
MCA	The Maritime and Coastguard Agency, which is responsible throughout the UK for implementing the Government's maritime safety policy, which includes coordinating search and rescue at sea through Her Majesty's Coastguard, and checking that ships meet UK and international safety rules.
MDHC	The Mersey Docks and Harbour Company. The MDHC's main business is the operation and maintenance of port facilities on the Rivers Mersey and Medway, and at Heysham on the west coast of the UK, north of Liverpool.
MSC	Mediterranean Shipping Company SA, the second largest ship owner in the world and a customer of harbour towage .
Norfolk Line	Norfolkline Shipping BV, operates Irish Sea and cross-channel ferries and is a customer of harbour towage .
NYK Line	NYK Line (Europe) RoRo Ltd, a ship owner and customer of harbour towage .
OFT	Office of Fair Trading.
Owner terminal	A terminal where the towage operator has an agreement with the owner of the terminal covering all vessels using it. There are 11 UK owner terminals.
Peel Holdings	Peel Holdings (Ports) Ltd. Peel Ports Division is the second largest ports group in the UK, handling over 40 million tonnes a year. Peel Ports owns Mersey Docks & Harbour Company and Carmet and operates the ports of Clydeport and the Manchester Ship Canal, providing a broad range of port facilities and services to shippers and cargo owners.
Pilotage	Navigation of a ship within ports and their approaches by a licensed pilot.

Port	A place on a waterway with facilities for loading and unloading ships. For the purposes of this report, we refer to 'ports' when referring to the port area in which towage services are provided. So, for example, the port of Liverpool covers not just the dock system at Liverpool, but the owner terminals at Tranmere, Birkenhead and Barrow.
Port Authority	Agency responsible for control and management of a port and its facilities.
Port Users' Group	Businesses that use a particular port acting together to express their interests via a formal grouping arrangement.
PSA Marine	PSA Marine Ltd. A towage operator based in Singapore.
Ro-ro ship	Roll-on roll-off ship, a type of ship designed to enable vehicles and cargoes to be driven on and off using a ramp.
Salvage	The act of attending a ship at risk at sea, and providing appropriate assistance to preserve the environment and the economic value of the vessel and its cargo.
Shell	Shell UK Ltd, part of a global group of oil, gas and petro-chemical companies with a broad portfolio of hydrogen, biofuels, wind and solar power interests. Also a terminal owner and customer of harbour towage in the UK.
Ship turnaround time	Time that elapses between a ship entering and leaving port .
Shipping agent	Shipping agents arrange all the necessary port services, including towage, on behalf of ship owners and charterers that choose not to make these arrangements themselves.
Shipping line	Company which provides shipping services.
Ship owner	A company that owns and operates its own fleet of ships.
Ship visit/call	Refers to a ship/vessel calling at a port .
SLC	Substantial lessening of competition.
Smit	Smit Internationale NV, a Dutch towage operator also offering salvage and terminal services.
SMS	SMS Towage Ltd, a towage operator present on the Humber.
Sonotrach Terminal	An owner terminal operated by BP on the Isle of Grain.
Spot business	The provision of towage services for one-off or irregular ship movements into and out of ports .
Spot customer	Customers with one-off or irregular ship movements into and out of ports requiring towage services .
SSNIP	Small but significant non-transitory increase in price.

Stern thrusters	A device fitted to the stern of a ship to provide transverse thrust.
Stevedoring	The process of loading and unloading ships.
Svitzer	Svitzer Marine Ltd, Svitzer PT Ltd and Tyne Towage Marine Ltd—UK-based towage operators .
SvitzerWijsmuller	SvitzerWijsmuller A/S, a Danish marine service company, active in harbour towage, offshore and terminal towage , salvage , emergency response and rescue, ocean towage and crew boat services and the immediate parent of Svitzer Marine Ltd. The acquiring company in the merger with which this inquiry is concerned.
Targe	Targe Towing Ltd, a towage operator present in Aberdeen and Dundee and which also provides services in the Firth of Forth, including the BP Oil terminal at Hound Point and operates tugs owned by BP at its Coryton terminal on the Thames.
Terminal	Wharf or pier and adjoining area where freight is loaded on to or unloaded from ships, typically serving a large industrial site such as an oil refinery.
THPUA	The Tees and Hartlepool Port Users' Association, which exists to develop and promote the economic, efficient and effective movement of goods through the ports of Tees and Hartlepool in the best interest of its members and their clients.
Tonnage tax	An alternative method of corporate taxation where tax is calculated based on the net tonnage of ships operated rather than on financial profit.
TGWU	The Transport and General Workers Union, the UK's biggest general union—caters for employees of every type of workplace, including tugboat crews .
Towage operator	A provider of towage services .
Towage services	The services offered by towage operators in using tugboats to manoeuvre vessels. Towage services for the purposes of this report include harbour and terminal towage .
Tractor tug	Tugboats which are designed to pull or push from their sterns. Tugs used for harbour towage can typically direct their thrust in any direction and have propeller units located both forward in the hull and at the tow point at the stern.
Tranmere Terminal	Tranmere Oil Terminal is situated on the River Mersey. It was opened in 1960 to handle vessels of up to 65,000 tons, and is connected to the Stanlow oil refinery by a 15-mile pipeline. It is operated by the Mersey Docks and Harbour Company.

Tug job	Each time a tug is called out to provide towage services for a ship is described as a tug job. For example, if a ship requires two tugs to berth and one to leave the port , these count as three tug jobs.
VLCC	Very large crude oil carriers.
Voith Schneider tug	The Voith Schneider tug operates using a Voith Schneider propeller, which is a unique propulsion system allowing the control of thrust in magnitude and direction smoothly, precisely and quickly.
ZIM UK	ZIM UK Ltd, a shipping line.