



TOWARDS DESIGNING AND CREATING A MULTIMODAL DEVELOPMENT CENTRE IN THESSALONIKI, IN A CHALLENGING ERA FOR THE GREEK FREIGHT TRANSPORT INDUSTRY

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Abstract: *The SEE area faces several multimodality-related challenges and opportunities. The establishment of Multimodal Development Centres (MDC) comprises a soft bottom-up measure towards the multimodality's share increase that was studied and advanced, among others, in the frame of the ADB (Adriatic-Danube-Black Sea) Multiplatform project (2012-2014), funded under the South East Europe Programme. Such a MDC organisation could provide soft and supporting services to the stakeholders of the logistics' industry. In this paper, the objectives, services and development phases of the suggested MDC in Thessaloniki are presented, by building on good practices and considering the challenges and opportunities that Northern Greece is urged to face. To conclude, the suggested Thessaloniki's MDC can act as a networking platform of dialogue and cooperation for all involved national players of the intermodal sector.*

Keywords: *intermodality, multimodality, business model, logistics, soft measure.*

1. Introduction

South East Europe (SEE), because of its crucial geographic position in the crossing of the three continents, Europe, Asia & Africa, could play an important role in freight transport and the promotion of international trade. However, serving demand (trade flows) from Far-East to central Europe and vice versa via the SEE intermodal route must compete other existing alternative routes, such as the route via Suez Canal & Gibraltar, and the route via North Sea. During the last years, various initiatives have been implemented aiming to promote intermodal transport in a wide sense. Among others, the

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development of Centres ('agencies') which promote inter-modality, near the most significant logistic nodes, could contribute to the boosting of the market and the economy of the freight transport sector by helping in overcoming obstacles (technical interoperability, data interchange, complexity of regulations and standards, etc.) that prevent from the greater use of intermodal transport. In the frame of the Adriatic-Danube-Black Sea Multiplatform project (within South East Europe Transnational Cooperation Programme, www.adbmultiplatform.eu), the concept of the Multimodal Development Centre (MDC) was developed, aiming at the implementation of centers (in particular 'agencies'), specifically dedicated to the promotion of intermodality, based on the model concept of Intermodal Promotion Centres, already applied in other EU countries.

The principal idea of the ADB project (2012-2014) was to develop and promote environmentally friendly, multimodal transport solutions from the ports in the SEE programme area to the inland countries and regions, along a selected pilot transnational network. The main objectives of the project included, among others, the development of a network of multimodal hubs in the SEE area, with common quality and performance standards, and the promotion of the multimodal transport as a real alternative to road transport. Within this context, ADB project developed an innovative model of intermodal promotion initiative, called 'Multimodal Development Centre' (MDC) based on similar past successful cases that promoted multimodality to the enterprises. The creation of local MDCs was designed in selected countries with the aim of forming later on a transnational network of MDCs in the SEE area.

After considering a number of existing initiatives and projects related to intermodal transport, a consultation process among the ADB partners was carried out in order to identify the scope, needs and targets of the proposed local MDCs. The ADB partners organised national and regional workshops, where the draft MDC concept was discussed with potential MDC's members, such as regional/national decision making bodies, transport and logistics operators, trading and entrepreneurs' associations, etc. This way the stakeholders' views were considered and their commitment and willingness to provide support towards the MDC opening were investigated.

In this conceptual paper, the ADB MDC model design is examined for the case of Greece, taking into consideration (1) the review of the key actors promoting intermodal transport related issues at the Greek national level, (2) the results of the surveys addressed to key stakeholders and conducted at local level, as well as (3) the peculiarities of the Greek intermodal transport context. The paper identifies and describes the range of services that could be provided by the proposed MDC, outlining gradual development phases over time.

2. The evolution towards the establishment of intermodal promotion bodies

Before presenting the ADB MDC model design for Greece, it is useful to briefly describe some similar case examples in the rest Europe, especially with regard to the evolution of the Short Sea Shipping (SSS) Promotion Centres (ADB, 2013a; 2013b). In 1997,

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the first national shortsea information bureau was founded in the Netherlands. In 2000, all existing national bureaus decided to create an informal platform of information exchange, the European Shortsea Network and to adopt a common name for themselves, namely Shortsea (Shipping) Promotion Centres (SPC). The **European Shortsea Network (ESN)** aimed to promote SSS at European level to several target groups, enhancing the modal share of SSS. The number of SPCs in Europe exceeded 20. All offer neutral advices, operate independently, cooperate under the 'umbrella' of ESN and include some principal activities, such as promotion, education, research, policy and networking.

The expansion of the role of the existing structures, such as SPCs, Logistics Competence Centres (LCC), etc., in order to cover the intermodal transport chain as a whole, was enhanced through various studies, etc., funded by EU (ADB, 2013a; 2013b) as the following described. **ISIC study** (2005) replaced the usage of the term 'Freight Integrator', starting using a new concept, the 'Intermodal Development Centre' (IDC). According to ISIC, an IDC is a '*catalyst non-profit organisation, which neutrally works on developing intermodal freight solutions along European corridors with a high intermodal potential, overcoming barriers, improving communication and creating synergies among actors, and generally supporting the shift towards more environmentally friendly modes of transport*' (ISIC, 2005). **ENLoCC project** (European Network of Logistics Competence Centers, 2003) focused on the need of strengthening the translational cooperation in logistics at a European level. **SUTRANET project** (Sustainable Transport Research & Development Network in the North Sea Region, 2007) analysed the logistics centres as IDC. **BE LOGIC** (Benchmark logistics for Co-modality, 2008) resulted to a Logistics Benchmarking Tool and the European Intermodal Route Finder (EIRF). **CIPROC** (Co-operative Intermodal Promotion Centre, 2008) examined the opportunities of expanding the activities of existing SPCs by developing the '*Intermodal Promotion Centres*' (IPCs).

Next, three cases of national SPCs that expanded their scope and range of activities to cover intermodal transport promotion, are being briefly described (ADB, 2013a; 2013b):

1. Croatia Intermodal Transport Cluster (KIP): the Cluster was founded by an initiative of the Croatian Ministry of the Sea, Transport and Infrastructure. Most of the maritime port authorities, operators, the Croatian railways, the larger agents and transport services providers, as well as some other interested organizations participated in the Cluster as members. The cluster is mainly dealing with the promotion, development projects and information provision on intermodal transport services.

2. The Lithuanian SPC/ LITTP-CCITL: the functions of Lithuanian SPC & IPC were overtaken by the LITTP and CCITL VGTU (administrative partner of LITTP). LITTP, the Lithuanian Technology Platform of intermodal transport was established in 2007, acting as a platform of key stakeholders, aiming for harmonized and effective performance along intermodal transport chain. CCITL is the Competence Centre of Intermodal Transport and Logistics, incorporated within the Vilnius Gediminas Technical University. LITTP brings together actors coming from the public sector (Ministry of Transport, Municipalities), the research sector and the transport business industry (Carriers' Association, Forwarders' Association, Lithuanian Railways, Stevedoring companies' association).

3. The Romanian Intermodal Association (RIA): RIA was founded in 2006 under the initiative of the Romanian Ministry of Transport, in cooperation with public authorities and private companies active in the field of transport. The body is a professional non-profit entity, promoting and developing the field of intermodal transport and inland waterway transport, and linking the national authorities with the private entities operating in the transport fields. The Association is acting as the Romanian SPC.

The above cases provide examples of the evolution of SPCs to national 'intermodal promotion centres'. KIP expanded its field of activity by addressing not only SSS, but also the intermodal transport chain as a whole. LITTP was linked strongly with the research sector establishing a national association, which shares some common aspects with the concept of 'triple helix'. These cases indicate that there is not any panacea solution for the designing of an intermodal promotion centre. On the contrary, the special national and local conditions, as well as the context can differentiate the development of such entities. In any case, the strong commitment and the engagement of many actors comprise essential prerequisites for the strengthening of such organisations (ADB, 2013a; 2013b).

3. Investigating the existing situation in Greece

In Greece, there are mainly six (6) organizations which deal with the issues of multimodal transport. All of them participated in the questionnaire survey on MDC, which was implemented during 22.01.2013-12.02.2013, in the frame of ADB project. The status, activities and objectives of these organisations are presented in brief below, enabling a complete view of the existing status concerning the promotion of multimodal transport (ADB, 2014b; 2014c).

1. **Association of International Freight Forwarders & Logistics Enterprises of Greece (IFFAG&L):** it represents legally FIATA (International Federation of Freight Forwarders Associations).
2. **Hellenic Shortsea Ship-owners Association (H.S.S.A.):** it keeps a full record of all matters relevant to the industry and provides to its members continuous and reliable information. It is involved in the National and International Organizations discussing maritime issues, giving emphasis on Short Sea Shipping. It has founded the Greek SPC.
3. **Hellenic Chambers' Transport Association (E.E.SY.M.):** it was founded by Greek Chambers in 1995 as a nonprofit organization. It aims on expertise exchange and support, studying of certain issues, cooperation with Public Authorities on transport related topics, including the development of intermodality. It participates in the European Logistics Platforms Association, EUROPLATFORMS.
4. **Hellenic Logistics Society (E.E.L.):** it is a scientific, non-profit association that promotes the market of Logistics and represents the Greek logisticians.
5. **Hellenic Association of Forwarding Agents (PEED):** it includes initiatives and activities aimed, among others, at promoting its members' interests, the studying of transport related issues, and the networking with bodies with common concerns.
6. **Greek Association of Supply Chain Management (GASCM):** it is the Hellenic Logistics Society of Northern Greece, being active, among others, in the promotion of the logistics science, the support of graduate courses, technical visits, etc.

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Table 1. Survey results

	Promotion activities	Logistics	Intermodal Consultations	Research activities	Innovations	EU projects	Bottle-necks
IFFAG&L	Yes	No	No	Yes	Yes	Yes	No
HSSA	Yes	No	No	No	Yes	Yes	Yes ⁵
EESYM	Yes	No	Yes ²	Yes	No	Yes	No
EEL	Yes	No	No	Yes ³	Yes	Yes	No ⁴
PEED	Yes	Yes ¹	Yes	Yes	Yes	Yes	Yes ⁵
GASCM	Yes	No	Yes ²	Yes	No ⁴	Yes	No ⁴

¹use of ICT tools; ²training to users; ³research activities, market demand, technology survey; ⁴it is planned; ⁵use of bottlenecks form.

The answers of the Greek organisations which participated in the survey are presented, towards defining the needs and the gaps for a Multimodal Development Centre in Greece (ADB, 2014b; 2014c). According to the survey's findings, all organisations are private, stand-alone independent, having long time operation and experience. They participate in various promotion activities such as workshops, conferences, round tables, publications, and their involvement in projects and research activities is quite high. Most of them do not record bottlenecks (but some intended to do) and none is providing logistics services. Concerning innovations, four (4) out of six (6) organizations were actively involved in following debating discussions on emissions. Only half of the surveyed organisations provided intermodal consultation to users in the form of training. Based on the survey, it was drawn that although several bodies in Greece were involved in the promotion of intermodal transport, there was not any organised and integrated MDC.

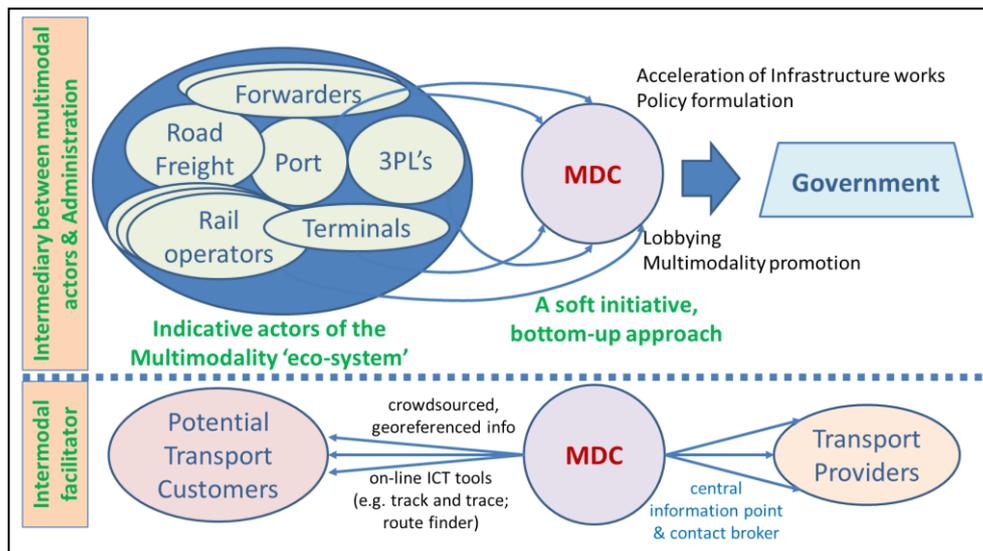
Furthermore, an additional questionnaire survey was carried out during the 4th Project Steering Meeting in Thessaloniki (25th-27th Sep. 2013), amongst 19 participating organisations on the feasibility of developing a MDC model and the activities that should be included within it. With regard to the opinions addressed in the survey (ADB, 2014b; 2014c), the consideration of the responses indicated that: 1) all agreed that the opening of a MDC in Greece would be useful; 2) all supported the integration within already existing initiatives; 3) participants were split almost in half, in terms of whether a MDC should focus on commercial or non-commercial services, while some of them claimed both; 4) the know-how exchange, the networking and the logistics services revealed as the most important activities; 5) training service was considered to be of great importance.

A potential MDC in Greece could involve existing transport organisations and associations, with clearly defined role. The MDC should place emphasis on the supply chain issues, the innovative technologies, the detection of bottlenecks, and the formulation of solutions for overcoming them. Ideally, MDC should focus also on providing information and facilitating the freight transport services, along the main axes and corridors which cross the country.

4. Outlining the model of the Hellenic MDC

At the Greek national level, there is not currently any MDC in operation dealing in particular with the promotion of intermodal transport. Given the fact that the intermodal transport share in Greece is very low and at the same time there is a huge potential for its market growth, as well as taking into account the fact that a great number of ports and land freight terminals exist in Greece, the development of a potential national MDC could play a **significant role** to the further advancement of intermodal transport. The suggested **MDC's vision** could be reflected through the following targets (ADB, 2014b; 2014c): (i) to become widely acknowledged as the primary organization, at national level, which undertakes the promotion of intermodal transport and provides a range of innovative and quality services to its members and the wider intermodal transport actors' environment; (ii) to assist in the growth of intermodal transport, which could lead to an increase of its share in Greece. The more focused objectives of the MDC could be to: (1) increase awareness and promote intermodal transport at national level; (2) disseminate intermodal transport information to a targeted audience; (3) provide training services to meet market needs; (4) participate in research & development initiatives; (5) enhance the intermodal transport knowledge base; (6) influence policy making in intermodal transport; (7) support cooperation between intermodal transport actors; (8) create synergies with other similar organisations; (9) integrate new transport services and activities. The main goal of a new MDC in Greece should be the integration of transport systems and supply chains (sea, road, rail) at a local, national, regional or even transnational level.

Figure 1: main functions of the suggested MDC Hellas at Thessaloniki



The most relevant existing organisation to a MDC, the Hellenic SPC (Short Sea Shipping Promotion Centre) focuses only on Short Sea Shipping, which comprises a part of the whole spectrum of intermodal transport activities. In this sense, several entities that

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share some common aspects with the aims of the proposed MDC could be incorporated as members of it or, alternatively, they could cooperate closely with it. The development of an MDC in Greece could be realised by expanding the role of an existing organisation or by creating a completely new organisational scheme based on the ADB concept and the already gained experience on multimodality issues. The Hellenic MDC could undertake the role of an **'umbrella' organisation**, providing full coverage of the intermodal sector. The MDC should (a) guarantee neutrality; (b) enjoy the continuous commitment and engagement of its members, and (c) be open, aiming to recruit intermodal transport stakeholders and actors as members of it, covering all transport modes (ADB, 2014c).

The **positioning** of the proposed MDC in the city of Thessaloniki would allow it to benefit from the existence of an important national intermodal hub, being located on the cross of key transport corridors. Thessaloniki's port is the 2nd largest national port acting as an intermodal transport gate that serves transit freight flows to and from Balkan countries, and to and from Central and Eastern Europe. Thessaloniki is part of the TEN-T IV corridor, the Corridor X and the axis of Via Egnatia. Finally, Thessaloniki is an important area of commercial and trading activity, being close to a number of Balkan capitals.

Concerning the MDC's potential members, MDC could aim to attract relevant intermodal transport stakeholders and actors, representing all, or at least the majority of, those involved in intermodal transport, e.g.: authorities at national, regional and local level; sea ports; operators from all transport modes; freight forwarders; brokers; terminal operators; research institutes; chambers of commerce and industry; technical chambers; bilateral chambers of commerce; professional & industry associations; SMEs; logistics operators and service providers; vocational training institutes; regional development agencies; non-profit organisations; transport consulting and engineering companies, etc. Stakeholders of Northern Greece, such as Chambers, business associations and local authorities have already a creative record on establishing jointly new targeted agencies for serving enterprises, such as: the Business and Cultural Development Centre (KEPA); Union Development of Macedonia (ANEM) Agency; TECHNOPSIS Thessaloniki ICT Business Park, etc. Thus, a new MDC in Greece could be established by those entities (enterprises, associations of exporters, transport operators of several modes, forwarders, etc.) who have interest in promoting multimodal transport in SEE.

The Greek ADB partners, in particular the Engineering School of the Aristotle University of Thessaloniki (Academia), the Thessaloniki Port Authority (intermodal terminal) and the Professionals' Chamber of Thessaloniki (Road Freight, Forwarders, etc.) signed in the frame of the ADB project a Memorandum of Understanding, towards the future establishment of the Hellenic MDC (ADB, 2014a). According to it, PCTh would host the MDC activity within its organizational structure, at least for the first implementation period. Although the MoU was not applied in practice systematically, the recent Port's privatization (and the Rail industry's transition), could comprise motivating and enabling factors that could re-activate the MoU's parties towards the implementation of the MDC.

5. Potential services provided by the proposed Hellenic MDC

There is a range of services, both revenue generating and free or low cost services that could be potentially provided by the Hellenic MDC, among which, for example, (1) the provision of intermodal information; (2) the intermodal promotion; (3) training; (4) research activities; (5) the intermodal policy and strategy formulation; (6) the provision of consulting services; and (7) the intermodal transport facilitation. A short description (ADB, 2014b; 2014c) of the content of each one of the identified services is provided below:

1. Intermodal information provision: a core service to be offered by the MDC is the provision of information on intermodal transport. MDC's home website should provide regularly updated information on new developments in the national and international intermodal transport field, e.g. market, research, technological innovations, project news and results, conferences and other events. Mutual exchange of information among several MDC's could be promoted on a cooperative and synergetic scheme. Over time, an intermodal transport online database (library) will be formed, containing relevant articles, reports, presentations, videos, best practice cases, legislation, etc.

2. Intermodal promotion: the promotion of intermodality (and multimodality) is one of the fundamental services of the proposed MDC, interlinked with the service of intermodal information provision. MDC would aim to provide a strong voice representing and promoting the intermodal transport sector at national and international level. Several online and offline communication modes and channels could be utilised, among which, the MDC's website, newsletters, emails, press releases, articles in newspapers or special professional magazines. The organisation of a conference on intermodal transport, presenting the most successful intermodal transport market actors on the basis of certain competitive evaluation criteria, either as a stand-alone event or incorporated within a similar already established institution, could be also contribute to the promotion of intermodality. The cooperation with foreign bodies could be realised in the form of joint round-tables, workshops, conferences, etc. at an international intermodal corridor level.

3. Training: training provision will comprise an important element of MDC's set of services. Activities related to the training include: the preparation of training modules; training conduct; examination; evaluation and certification. The running of a market survey with the aim of identifying market needs and gaps would support the design and selection of the training modules. For instance, the training thematic topics could cover aspects, such as: the basics of intermodal transport, its benefits and opportunities; best practice cases from homeland and abroad; transport interoperability issues etc. Customisation of the training material according to the professional/educational needs of trainees would allow providing targeted training. Study technical visits at terminals could enable connecting theoretical knowledge with real practice. Usage of modern educational methods, such as e-learning, could be also examined.

4. Research: the MDC could seek for funding through project-based opportunities on research and development issues, in particular by participating as a consortium partner in EU funded research and territorial cooperation projects, as well as in national research programmes. Potential issues to be addressed are related to intermodal transport

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promotion, best practices, innovations, technologies, business concepts, measures tackling bottlenecks, etc. Apart from enhancing the knowledge base, the involvement in international initiatives will enable the building of contacts with key stakeholders.

5. Policy and Strategy formulation: the MDC could be involved in the formulation of intermodal transport policy and strategy. This may include the preparation of position papers, reports, etc. and the organisation of discussion forums and round tables, with the aim of identifying the main problems, gaps or bottlenecks related to intermodal transport, and examining policy and strategy issues. MDC can target policy makers that are responsible for drawing the transport strategy and policies at local, regional, national and EU level, bridging the public bodies being responsible for the policy elaboration with the private sector's actors that are directly affected by them.

6. Consulting services: the MDC could provide consulting services to the private sector as an agency having expertise on intermodal transport issues. The range and depth of topics to be covered would depend on the knowledge base and expertise that MDC will acquire during the passage of the time. Indicative examples of intermodal transport related consulting services include: feasibility studies; cost-benefit analyses; reviews; business case analyses; market and industry analyses, business and marketing plans, legal and technical support for the establishment of a new intermodal transport service.

7. Intermodal facilitation: only Freight/Logistics Villages/Centres that undertake the role of the MDC would be able to provide actual logistics services. However, the proposed MDC could act as an intermodal transport facilitator, namely as an intermediary in the actual transport process. The MDC could comprise a reference central information point and contact broker between potential transport customers (especially SMEs) and transport providers. This service should evolve by building on the existence of a permanent help-desk point which will provide specialised market information on intermodal transport services and connections in a customized way. The development of an information database will be required for this purpose. This should be maintained and continuously updated to ensure the validity of the information provided. Supplementary on-line ICT tools would enhance this service, providing additional customised market information, e.g. intermodal transport tracking and tracing, intermodal route finder, real-time monitoring of intermodal transport corridor performance, etc.

The possibility of providing value-adding commercial services could be examined, especially if these can fill in existing market gaps, avoiding competition with other entities that could damage MDC's neutrality (ADB, 2014b; 2014c). For example, the MDC could act as a National Intermodal Transport Observatory, collecting regularly intermodal transport data (at national and/or corridor level) and maintaining relevant databases. The provision of (a) reliable, (b) up to dated, (c) direct, and (d) geo-referenced information, maybe by establishing a dynamic and interactive database platform could be examined. Information input could be shared by the professionals themselves (that could be specially authorised). The concept of "crowdsourcing" could be also exploited (e.g. a possible scenario could involve a truck driver who informs about the strike of the customs agency officers at the borders). The provision of spatial information could be implemented through the use of

constantly updated maps and by exploiting the concept of 'maptivism'. In the same sense, the MDC could also provide useful facilitating ICT tools (e.g. track & trace) or an online Intermodal Route Finder, enabling users to find information on intermodal connections.

In order to present a more realistic model for the MDC's development, a set of three distinct MDC time period phases is proposed (ADB, 2014b), based on a step by step approach over time. Each development phase incorporates the MDC's previous stage of development. Development *phase 1 (short-term period)* would consist of the combination of services 1 & 2 (information, promotion) that comprise the minimum basic platform for the development of the MDC. Development *phase 2 (medium term period)* would consist of the services 1, 2, 3 & 4. In this phase, the MDC can proceed with the offering of an additional set of services. Development *phase 3 (long term period)* consists of the full range of the MDC's foreseen services, namely it builds on the phases 1 & 2, incorporating services such as intermodal transport policy/strategy formulation, consulting services and intermodal facilitation (logistic services as a contact online broker, not physical).

6. Concluding considerations

The promotion of multimodal freight transport and logistics is of great importance for Greece and the SEE region in order to enhance the economy and become globally competitive in terms of logistics performance. A key precondition for the required integration of transport systems and supply chains at a local, regional and transnational level is the close cooperation between all key stakeholders. The operation of the designed MDC Hellas at Thessaloniki, as a potential soft and bottom-up initiative, could promote multimodality, facilitating the trade flows along the main freight transport corridors.

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**PROJEKTOVANJE I IZGRADNJA MULTIMODALNOG RAZVOJNOG CENTRA U
SOLUNU U ERI IZAZOVA ZA TRANSPORTNO INDUSTRIJU GRČKE**

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***Rezime:** Područje jugoistočne Evrope suočava se sa brojnim izazovima i mogućnostima vezano za multimodalnost. Uspostavljanje multimodalnih razvojnih centara (MDC) obuhvata mere za povećanje udela multimodalnosti, koja je proučavana i unapređena, između ostalog, u okviru ADB (Jadran-Dunav-Crno More) Multiplatform projekta ADB (2012-2014), finansiranog u okviru Programa Jugoistočne Evrope. Takva MDC organizacija može pružiti meke i prateće usluge zainteresovanim stranama u logističkoj industriji. U ovom radu predstavljeni su ciljevi, usluge i razvojne faze predloženog MDC-a u Solunu, na osnovu dobrih praksi i uzimajući u obzir izazove i mogućnosti sa kojima je Severna Grčka primorana da se suoči. Da zaključimo, predloženi Solunski MDC može delovati kao mrežna platforma dijaloga i saradnje za sve uključene nacionalne igrače intermodalnog sektora.*

***Gljučne reči:** intermodalnost, multimodalnost, biznis model, logistika, mere.*

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