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Mobility is increasingly focused on delivering value to customers. To achieve this, many are leveraging technology and vendor partnerships to streamline operations and improve the Mobility experience. When asked for this year’s priorities, 69% of participants selected simplifying administration, 63% chose enhancing the employee experience, and 48% indicated improving communications with the business. Proactively engaging customers for input, evergreen policy reviews, and searching the market for leading products, services, and technology are now part of Mobility’s regular activities. We have identified three key areas that support this general trend, and which we explore in detail in this year’s report:

### Making good decisions
Data is helping customers make informed short- and long-term talent decisions. Improved cost transparency, tracking, and planning allow companies to select candidates best suited for international assignments, establish desired outcomes for these moves, and understand capability and required skills for succession planning. Mobility has made progress with advising the business on package selection by sharing its compliance knowledge and highlighting demographic patterns and trends over time.

### Ensuring effective governance
Simplifying and reorganizing Mobility tasks and approvals is helping to expedite moves, reduce noise, and provide much-appreciated clarity.

### Communicating creatively
The most noticeable area of advancement this year has been the use of digital platforms to communicate with customers, including the use of engaging customer videos, chat features, and digital media, showcasing Mobility’s flexibility and adaptability.

In this report, we’ll look closer at each of these areas and share insights from companies leading the way toward Mobility’s modernization. We’ll also explore the latest policy trends and highlight approaches rising in popularity this year.
of companies say **Mobility is successful if they receive positive feedback** from the business

87%

of companies **require senior leadership approval** for international assignments

70%

of companies are **prioritizing simplifying operations** this year

69%

of companies **require cost projections** to secure approval for international assignments

64%

of companies offer assignees **flexibility** by delivering cash or offering benefit choices

51%

of companies **expect requests for mobility** to increase in 2019

51%

of companies are **looking to add a new policy this year** (commuter is the top choice)

40%

**MOBILITY STATS**

- Avg number of policies 5.3 compared to 4.4 in 2018
- The median number of expats per full time Mobility employee = 43
- Mobile employees make up 1.7% of the workforce
MAKING

Good Decisions

Making good Mobility decisions begins with a desire to add value and strengthen customer partnerships. Customers can be line managers, the broader business units, or assignees.

In many organizations, all three are considered Mobility’s customers. Identifying key customers and their priorities is a vital step to achieving lasting, positive outcomes. Most participants noted that the primary purpose of moving talent around the organization is to fill skill or knowledge gaps. In addition, from responses to the question on how Mobility defines success, we can see that 87% of companies prioritize business satisfaction. These answers indicate that the business is Mobility’s primary customer. However, when asked how often Mobility engages the business when considering policy changes, most participants responded with “sometimes” or “often” rather than “always.” Engaging the business to learn what they value helps Mobility make good decisions about resources and approaches.

Cost remains a critical part of Mobility decisions. 64% of organizations require an estimate for assignment or transfer approval. However, the true expense or return on investment (ROI) of an assignment is difficult to capture because a cost estimate is only one part of a larger equation. Other factors impacting ROI – such as employee engagement, retention, and promotion post-assignment – are measured by a minority of organizations. Most (57%) indicate they do not track these outcomes of the organization’s investment in Mobility.

In addition to filling skill gaps, customer requirements are increasingly diversified. Successful Mobility functions are those that can engage with customers to understand their wider needs and offer solutions that allow the business to make good decisions in these areas. Ultimately, good decisions are the result of exploring customer needs and collaborating with customers and external partners to implement solutions that reflect the purpose of Mobility within the organization.
“Our top priority is implementing better cost control.”

North American Consumer Goods Company

WHAT DO YOU CONSIDER TO BE THE MOST IMPORTANT OUTCOME OF A CROSS-BORDER ASSIGNMENT?

**Average Rank**

- To fill staffing needs in locations where skills or knowledge are not available: 4.1
- To provide strategic business direction: 3.3
- To provide professional development and global skills for assignees: 2.9
- To provide training/development for staff in host offices: 2.2
- To spread organizational values and culture: 1.7

Key: 5=extremely important, 4=very important, 3=moderately important, 2=slightly important, 1=not important
We know we are successful when we earn the trust of the business.

North American Consumer Goods Company

HOW DOES YOUR MOBILITY FUNCTION KNOW IT IS SUCCESSFUL? (MULTIPLE RESPONSES POSSIBLE)

👉 87%
Positive feedback received from the business

👉 71%
Positive feedback received through assignee surveys

👉 56%
Policy exception requests are kept to a minimum

💰 24%
Budget is not exceeded

⚠ 75%
Compliance risks are minimized or nonexistent

ﾘ 60%
Assignment/transfer processes are standardized and efficient

⭐ 34%
Employee commitment is enhanced because of an assignment/transfer

LOW RESPONSE RATE HERE INDICATES AN OPPORTUNITY TO BETTER BALANCE SHORT AND LONG TERM VIEWPOINTS ON TALENT INVESTMENTS.
TO WHAT EXTENT DOES GLOBAL MOBILITY ASK FOR INPUT FROM THE FOLLOWING STAKEHOLDERS IN YOUR ORGANIZATION WHEN CONSIDERING OR MAKING CHANGES TO MOBILITY POLICIES?

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Average Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Senior Leadership</td>
<td>4.5</td>
</tr>
<tr>
<td>HR</td>
<td>4.4</td>
</tr>
<tr>
<td>Host Business Unit</td>
<td>3.7</td>
</tr>
<tr>
<td>Talent Management</td>
<td>3.4</td>
</tr>
<tr>
<td>The Assignee</td>
<td>2.9</td>
</tr>
</tbody>
</table>

Key: 5=Always, 4=Often, 3=Sometimes, 2=Rarely, 1=Never

Tech companies engage talent management more than other industries (4.2).
**Do you run a cost projection as part of the assignment planning process?**

- **64%** Yes, always; cost projections are required for assignment approval
- **27%** Yes, but optional or used for informational purposes only
- **9%** No, we do not run assignment cost projections

92% of manufacturing companies require a cost projection for approval.
DO YOU MEASURE THE ACTUAL VERSUS ESTIMATED COST FOR INTERNATIONAL ASSIGNMENTS?

- No: 52%
- Case-by-case Basis: 36%
- Yes: 12%

27% OF PHARMA COMPANIES ALWAYS COMPARE ACTUAL AND ESTIMATED COSTS.
[To help measure success] an individual development plan is completed prior to assignment and referenced/updated during the assignment through repatriation.

European Automotive Company

WHAT DO YOU USE TO MEASURE AN EMPLOYEE’S SUCCESS ON ASSIGNMENT? (MULTIPLE RESPONSES POSSIBLE)

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>57%</td>
<td>N/A; we do not measure assignment success</td>
</tr>
<tr>
<td>26%</td>
<td>Assignee satisfaction survey during assignment</td>
</tr>
<tr>
<td>23%</td>
<td>Job performance rating during assignment</td>
</tr>
<tr>
<td>21%</td>
<td>Assignee satisfaction survey after assignment</td>
</tr>
<tr>
<td>11%</td>
<td>Job performance rating after assignment</td>
</tr>
<tr>
<td>11%</td>
<td>Job promotion(s) after assignment</td>
</tr>
<tr>
<td>6%</td>
<td>Job promotion(s) during assignment</td>
</tr>
</tbody>
</table>

These results indicate an opportunity to measure return on investment by understanding promotability and performance.
DO YOU TRACK RETENTION AFTER REPATRIATION?

70% NO, WE DON’T TRACK RETENTION POST-REPATRIATION

10% YES, FOR 3 YEARS OR MORE POST-REPATRIATION

9% YES, UP TO 1 YEAR POST-REPATRIATION

4% YES, UP TO 2 YEARS POST-REPATRIATION

7% OTHER

25% of consumer goods companies track retention for 3 yrs or more.
For some Mobility functions, governance is solely about compliance. For a growing number of Mobility leaders, it is about balancing oversight and flexibility. Most participants indicate that multiple stakeholders must approve an international assignment before it moves forward. The host business is typically responsible for absorbing mobility costs and is noted as an approver in 77% of organizations. In contrast, Mobility, which creates and administers the policies, is an approver in just a third of organizations. This approval structure generates a requirement for Mobility to respond to the diverse needs of the business and explains the continuing trend of Mobility offering flexible package options for the business. Forty percent of participants meet that requirement by differentiating policies by length and purpose, while 32% (up from 26% last year) offer flexibility via negotiation.

In companies offering assignment flexibility, Mobility tends to play an advisory role with 39% of organizations indicating Mobility recommends assignment and transfer packages for the business’ consideration. In 14% of organizations, Mobility is responsible for defining assignment benefits and support and only 9% allow the business to structure packages without Mobility’s input.

Expanded possibilities for personalized packages and business choice require a strong and supportive governance framework. Successful Mobility programs reinforce the Mobility decision-making process with clear governance oversight.
WHICH STAKEHOLDERS MUST APPROVE WHO GOES ON AN INTERNATIONAL ASSIGNMENT?

(multiple responses possible)

- 77% Host Business
- 70% Senior Leadership
- 61% Home Business
- 58% Host HR
- 45% Home HR
- 33% Global Mobility
- 8% Corporate Talent Council

55% of engineering & construction companies require mobility’s approval.
We are introducing a new policy to enable flexibility based on the purpose of assignments.

European Automotive Company

HOW WOULD YOU BEST DESCRIBE GLOBAL MOBILITY’S APPROACH TO PROVIDING FLEXIBILITY TO THE BUSINESS?

(multiple responses possible)

40% Multiple policies:
Policies differentiated by length but also purpose or other prescriptive criteria dictating which policy applies (e.g., separate standard and developmental policies)

32% Flexibility by exception:
Flexibility provided by individual negotiation and exceptions

32% Assignment length only:
All assignees go on the same policy segmented by assignment length only with little flexibility (e.g., one long-term policy for all assignees, one short-term policy)

26% Core/Flex:
Policy offers “core” benefits for all employees while the business has the flexibility to add or adjust other “flexible” benefits

26% Tiers within policy:
Policy(ies) outline benefits by job level or other criteria

44% of financial services companies have Core/Flex policies.
**IF YOU HAVE A FLEXIBLE APPROACH (E.G., MULTIPLE POLICIES, CORE/FLEX, TIERS), WHO TYPICALLY DECIDES WHICH POLICY/PACKAGE APPLIES?**

39%  
Global mobility recommends which policy/package applies, but the business ultimately decides

23%  
N/A; we don't have flexibility

14%  
Global mobility decides which policy/package applies

9%  
The business decides which policy/package applies with minimal to no input from mobility

9%  
Handled on a case-by-case basis

5%  
Other

20% OF PHARMA COMPANIES REPORT THE BUSINESS MAKES PACKAGE DECISIONS WITHOUT MOBILITY’S INPUT.
Forty-four percent of companies see an opportunity to improve the way Mobility communicates with employees while 48% are prioritizing better communication with the business. With increasing policy options and governance models that encourage the business to make package decisions, Mobility has begun focusing on communications to provide guidance and distribute important information to the business as well as employees. Both audiences are important customers and connecting with them in a targeted way helps Mobility in the short and long term. Eighty-six percent of companies are making efforts to improve employee experience and dynamic, one-to-many communications like videos, portals, and training modules engage employees while reducing administration. These resources can, for example, help the 17% of participants that provide cash lump sums explain the intent of such payments to encourage more thoughtful spending.

Communicating with the business has historically been done on a case-by-case basis, but new resources, such as Mobility decision guides, help the business create compliant packages or select policies that balance assignment investment and purpose.

“[We are working on] better communication/visibility for HR and employees.”

North American Chemicals Company
Are you doing any of the following to improve the employee experience during an international assignment or transfer? (multiple responses possible)

- **61%** Streamlining the employee's point of contact (or providing a single point of contact)
- **26%** Offering policies that allow employees some choice of benefits
- **26%** Automating assignment/transfer workflow
- **15%** Allowing employees to self-serve aspects of their assignments/transfers
- **11%** Providing assignment/transfer goals
- **10%** Tracking goals over the course of the assignment/transfer
- **14%** N/A; we are not currently focused on the employee experience

38% of manufacturing companies offer employee choice in policy.
Please indicate if your company offers flexible choice to the employee in any of the following ways.

(multiple responses possible)

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>36%</td>
<td>Providing a cash allowance in lieu of individual benefits (e.g., cash home leave allowance)</td>
</tr>
<tr>
<td>17%</td>
<td>Offering a cash lump sum for multiple benefits (e.g., cash in lieu of in-kind relocation support)</td>
</tr>
<tr>
<td>16%</td>
<td>Offering choice between a cash allowance or in-kind benefits (e.g., employee picks cash or service for relocation)</td>
</tr>
<tr>
<td>6%</td>
<td>Offering a flexible spending budget or flex points approach (e.g., a budget against which employees can withdraw in-kind services of their choosing)</td>
</tr>
<tr>
<td>49%</td>
<td>None of the above</td>
</tr>
</tbody>
</table>

27% of financial services companies offer lump sums.

"We are moving to a flex point approach."

European Construction Company
Do you feel that the potential financial impact of an assignment/transfer is adequately communicated to employees by the Mobility team?

- **32%** Yes, we are doing a good job of communicating the potential financial impact of assignments/transfers with employees
- **44%** Somewhat, we have an opportunity to improve employee communications regarding the potential financial impacts of assignments/transfers with employees
- **14%** No, we are not effectively communicating the potential financial impact of assignments/transfers with employees
- **10%** N/A; communicating potential financial impacts is not part of Mobility’s responsibilities

45% of tech companies think they are communicating effectively.
Most participants report that the demand for Mobility is stable or growing. There are noted changes to the types of assignments and transfers being used today. Compared with last year, 13% more companies now have an international one-way transfer policy (72% vs 59% in 2018). While some organizations deploy one-way transfers with a plan for the employee’s growth to continue in the host location, many transfer individuals indefinitely without knowing what’s next. This latter approach answers short-term business needs but ignores the long-term return on investment that is possible with thoughtful international deployments.

In addition to increased interest in one-way transfers, multiple organizations reported their intentions to add a Commuter policy to their Mobility program. The growing use of commuter arrangements reinforces the trend of companies supporting more flexible work arrangements. Although Commuter policies have claimed this year’s top spot, Business Traveler policies continue to be a priority, demonstrating a continued broadening of the scope of the Mobility function.

Has the overall need for international mobility at your company increased, decreased, or remained the same in the past year (this includes all cross-border moves such as traditional long-term assignments, short-term assignments, one-way transfers, locally-hired non-nationals, etc.)?

- **48%** increased
- **12%** decreased
- **40%** remained about the same
2015 - 2019 Comparison of Mobility Demand

**KEY:**
- Companies reporting an increased need for international mobility
- Companies reporting a decreased need for international mobility
Please indicate which of the following policies your company currently has in its cross-border mobility suite.

<table>
<thead>
<tr>
<th>Policy</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short-Term Assignment</td>
<td>90%</td>
</tr>
<tr>
<td>Long-Term Assignment – Home-Based Approach</td>
<td>85%</td>
</tr>
<tr>
<td>International One-Way Transfer</td>
<td>72%</td>
</tr>
<tr>
<td>Localization (Expat to Local)</td>
<td>55%</td>
</tr>
<tr>
<td>Business Travelers</td>
<td>44%</td>
</tr>
<tr>
<td>Developmental/Graduate Program</td>
<td>36%</td>
</tr>
<tr>
<td>Locally Hired Non-National</td>
<td>35%</td>
</tr>
<tr>
<td>Commuter</td>
<td>34%</td>
</tr>
<tr>
<td>Long-Term Assignment – Home-Based “Light” Approach</td>
<td>26%</td>
</tr>
<tr>
<td>Long-Term Assignment – Temporary Host Pay-Based Approach</td>
<td>17%</td>
</tr>
<tr>
<td>Rotator (for O&amp;G/Construction/etc. projects)</td>
<td>14%</td>
</tr>
<tr>
<td>Long-Term Assignment – Globalist</td>
<td>13%</td>
</tr>
<tr>
<td>Long-Term Assignment – Volunteer/Employee Accommodation Package</td>
<td>9%</td>
</tr>
</tbody>
</table>

56% of oil and gas companies have a one-way transfer policy.
Are you looking to add or eliminate any policies in the upcoming year?

- 57% We're not looking to add or eliminate any policies in the upcoming year
- 6% We're looking to eliminate policies
- 40% We're looking to add policies

62% of manufacturing companies are planning to add another policy.
Top 5 policies companies plan to add this year:

(Ordered by demand)
Commuter

Business Traveler

International Permanent Transfer

Home-Based Long-Term Assignment Light

Locally Hired Non-National
Looking Ahead

The most significant change in Mobility today is how the function works and communicates with customers. Participants reported ongoing and planned initiatives to improve Mobility’s visibility and engagement with customers, and many are leveraging technology and vendors to make that happen. Mobility is also increasingly focused on providing the business accurate cost estimates and planning support.

In addition to these operational and communication enhancements, there is a continued expansion of Mobility’s remit with many assuming responsibility for business travelers, commuters, locally hired non-nationals, and domestic relocations. The consolidation of all things Mobility is increasing market demand for integrated and agile technology solutions that streamline workflow, cost planning, communication, and tracking. The Mobility function of tomorrow will be more connected, resourceful, and impactful than ever before.

“Our top priority is implementing new policies that offer benefits based on assignee experience and need.”

North American Oil & Gas Company
### What are Global Mobility’s Top Priorities in the Upcoming Year?

(multiple responses possible)

<table>
<thead>
<tr>
<th>Priority</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simplifying administration/streamlining operations</td>
<td>69%</td>
</tr>
<tr>
<td>Employee experience</td>
<td>63%</td>
</tr>
<tr>
<td>Aligning mobility program with talent strategy</td>
<td>53%</td>
</tr>
<tr>
<td>Better communication with the business</td>
<td>48%</td>
</tr>
<tr>
<td>Technology solutions</td>
<td>43%</td>
</tr>
<tr>
<td>Reducing cost</td>
<td>35%</td>
</tr>
<tr>
<td>Establishing clearly defined criteria to make decisions</td>
<td>32%</td>
</tr>
<tr>
<td>Increasing flexibility within policies</td>
<td>32%</td>
</tr>
<tr>
<td>Introducing new policy types</td>
<td>29%</td>
</tr>
<tr>
<td>Increasing the speed to deploy cross-border talent</td>
<td>20%</td>
</tr>
<tr>
<td>Eliminating existing policy types/simplifying the policy suite</td>
<td>10%</td>
</tr>
</tbody>
</table>

80% of Consumer Goods companies are looking to improve the Employee Experience

63% of Tech companies are looking to improve Communication with the Business
DO YOU EXPECT THE OVERALL NEED FOR INTERNATIONAL MOBILITY AT YOUR COMPANY TO INCREASE, DECREASE, OR REMAIN THE SAME IN THE UPCOMING YEAR?

51% INCREASE

7% DECREASE

42% REMAIN ABOUT THE SAME

82% OF ENGINEERING AND CONSTRUCTION COMPANIES EXPECT AN INCREASE.
In the upcoming year, are you planning to outsource more or less of your mobility functions (such as tax, immigration, relocation services, payroll, etc.)?

- 68% of companies are not looking to make any changes to the functions being outsourced or handled in-house.
- 28% are looking to outsource more of their mobility functions in the next year (e.g., have more functions partially or fully performed by an external vendor).
- 5% are looking to outsource less of their mobility functions (e.g., perform more functions in-house instead of by an external vendor).

43% of Asia-based companies are looking to outsource more.
## Industry

<table>
<thead>
<tr>
<th>Industry</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumer Goods</td>
<td>12%</td>
</tr>
<tr>
<td>Engineering &amp; Construction</td>
<td>7%</td>
</tr>
<tr>
<td>Financial &amp; Professional Services</td>
<td>9%</td>
</tr>
<tr>
<td>High-Tech</td>
<td>12%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>8%</td>
</tr>
<tr>
<td>Oil/Gas &amp; Energy Services</td>
<td>16%</td>
</tr>
<tr>
<td>Pharmaceuticals</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>28%</td>
</tr>
</tbody>
</table>

## Report Demographics

![World map with regional percentages]

- **60%** Asia Pacific & Australia
- **31%** Europe
- **1%** Middle East
- **1%** North America
- **8%** South/Latin America
Survey Participants

168 COMPANIES PARTICIPATED IN THE 2019 MOBILITY OUTLOOK SURVEY.

The following is a partial list of participating companies:

ADP, LLC
Aecon Group Inc.
Aetna
Agilent Technologies
Air New Zealand
Airbnb
Albemarle Corporation
Alfa Laval
Allstate Insurance Company
American Express
Anadarko Petroleum
Aon
Apache Corporation
ASICS America Corporation
Asurion
Avery Dennison
Babcock International
BASF Corporation
BAT
Bayer
Boston Consulting Group
Bechtel
Bristol-Myers Squibb
BNY Mellon
Boe Technology Group Co.
BorgWarner
Bose Corporation
BP
Brown-Forman
Brunswick Corporation
Carlsberg Group
Caterpillar Inc.
CGG
Chevron Corporation
China Southern Petroleum Exploration and Development Corporation
Colgate-Palmolive
Comcast NBCUniversal
Continental AG
COTY
Covestro Deutschland AG
Daimler AG
DELL
Deutsche Telekom
DFS Group
Diamond Offshore Drilling
DLA Piper
Dow
DXC Technology
Ecolab
Ensco, Inc.
Equinor
Ernst & Young
Ferring Pharmaceuticals Inc.
Ford Motor Company
Gap Inc.
Gildan
GlaxoSmithKline
Habitat for Humanity
Halliburton
Hess Corporation
Hewlett-Packard
Hitachi Europe
Idexx Laboratories
Indeed
Ingersoll Rand Inc.
International Rescue Committee
International SOS
JT International
Kellogg’s
Kohler Co.
Laureate Education
Lear Corporation
Lenovo
L’Occitane en Provence
Maersk Drilling
Marathon Oil
Mars
McDonald’s
MediaCom
Micron Technology
MOL
Momentive
Morgan Stanley
Multi-Inversiones, S. A.
Nokia
Northern Trust
Novartis
NUS
Occidental Petroleum
Oceaneering International
OMV
Owens-Illinois
Paccar
Parker Drilling Company
Parsons Corporation
Pearson
Pembina Pipeline
PETRONAS
Pfizer
Philip Morris International
Phillips 66
Red Bull
Renault
Relpol
RHI Magnesita
Rio Tinto
Roche Holding AG
Rockwell Automation
Royal Bank of Canada
Rubicon Oilfield International
Sage Group
Saint-Gobain
Salesforce
Sanofi
S.C. Johnson & Son
Schindler Group
Sea Consortium Pte. Ltd.
SEG-Automotive
Shell
Siemens
Solvay S.A.
SRAM Corporation
Superior Energy Services
TD Bank Group
Teck Resources
Teva Pharmaceutical Industries
TI Automotive
The Travelers Companies
UBS
UCB
Unilever
Valero Energy
Vermilion Energy
VF Corporation
Viasat, Inc.
VMware
W.R. Grace and Company
Wells Fargo
Western Union, LLC
WestRock
Winrock International Institute
For Agricultural Development
How AIRINC’s Advisory and Benchmarking Team Can Help You:

**POLICY AND PRACTICE**
- Ensure market competitiveness
- Introduce a new policy
- Increase flexibility
- Simplify policy or process

**OPERATIONS**
- Streamline operations
- Reduce cost

**CHANGE MANAGEMENT**
- Help guide policy selection
- Understand program cost
- Train staff and customers
- Campaign for change

**COMMUNICATIONS**
- Improve the customer experience
- Message with creative media platforms
- Update mobility’s brand and image

**BENCHMARKING:**
- Access market practice relevant to your industry
- Scorecards – understand your market position

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