

NEAT EVALUATION FOR G-P:

Global Employer of Record Services

Market Segment: EOR Product Innovation

Introduction

This is a custom report for G-P (formerly Globalization Partners) presenting the findings of the 2025 NEAT vendor evaluation for *Global Employer of Record (EOR) Services* in all the *EOR Product Innovation* market segment. It contains the NEAT chart of vendor performance, a summary vendor analysis of G-P for global EOR services, and the latest market analysis summary.

This NelsonHall Vendor Evaluation & Assessment Tool (NEAT) analyzes the performance of vendors offering global EOR services. The NEAT tool allows strategic sourcing managers to assess the capability of vendors across a range of criteria and business situations and identify the best performing vendors overall and with specific capability in delivering EOR product innovation.

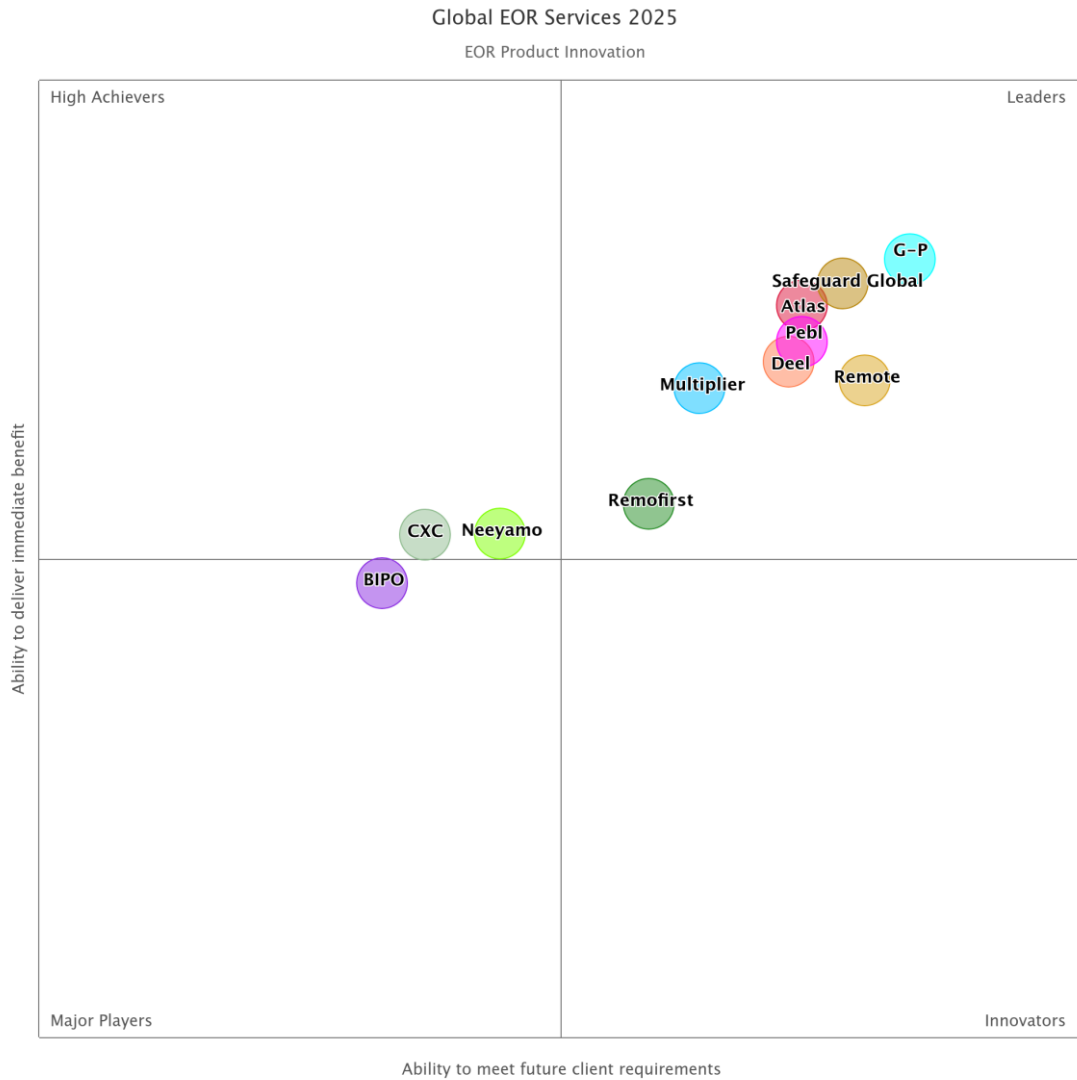
Evaluating vendors on both their ‘ability to deliver immediate benefit’ and their ‘ability to meet client future requirements’, vendors are identified in one of four categories: Leaders, High Achievers, Innovators, and Major Players.

Vendors evaluated for this NEAT are: Atlas, BIPO, CXC Global, Deel, G-P, Multiplier, Neeiamo, Pebl, Remofirst, Remote, and Safeguard Global.

Further explanation of the NEAT methodology is included at the end of the report.



NEAT Evaluation: Global EOR Services (EOR Product Innovation)



NelsonHall has identified G-P as a Leader in the *EOR Product Innovation* market segment, as shown in the NEAT chart. This market segment reflects G-P’s ability to meet future client requirements as well as delivering immediate benefits to its global EOR services clients with specific capability in delivering EOR product innovation.

Leaders are vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements.

Buy-side organizations can access the *Global Employer of Record Services NEAT tool (EOR Product Innovation)* [here](#).



Vendor Analysis Summary for G-P

Overview

G-P delivers global employment solutions to companies of all sizes across the full employee lifecycle, with a robust suite of products including Global HR Agent, G-P Gia, and AI-enabled Employer of Record (EOR) and Contractor products. These solutions support HR, tax, compliance, payroll, legal, and in-country advisor services. G-P provides SaaS-based solutions to thousands of clients, supporting 180+ countries, ~100 entities, and ~150 currencies.

The company was founded in 2012 by CEO and Executive Chair Nicole Sahin, who identified opportunities to support organizations seeking help navigating the complexities of global expansion and staffing activities. G-P established its initial global legal infrastructure and engaged its first client in 2013. By 2015, the company had established legal entities on three continents and secured over 100 clients.

Since its inception, G-P has raised ~\$350m in equity funding across two rounds. In October 2022, the company rebranded from Globalization Partners to G-P and in 2023, launched G-P Assist, an advanced, contextually aware AI integrated directly into the platform and available within G-P EOR and G-P Contractor. In 2024, it launched its Global HR Agent, G-P Gia.

G-P maintains a vendor ecosystem comprising more than 200 partners, including strategic technology partnerships with HR, payroll, and HCM providers to enrich its technology stack and complement its solutions. In March 2023, the company partnered with Wise to accelerate cross-border payments for contractors and freelancers. The same month, G-P announced its collaboration with UKG, a workforce management solutions provider. In May 2024, it announced its expanded partnership with ADP to deliver global EOR, contractor, and payroll solutions to organizations worldwide.

G-P positions itself as an HR technology provider supporting firms in all aspects of global employment. The company's technology and compliance infrastructure enables companies to manage the entire employee lifecycle, mitigate risk, and manage compliance, taxes, benefits, and payroll globally, regardless of entity status. G-P backs its global employment offerings with more than a decade of experience, its team of in-country HR, legal, and compliance experts, a robust partnership ecosystem, and GenAI and agentic AI technologies.

G-P prices its EOR services as a flat fee plus the total cost of employment, including salary, benefits, country-specific social compliance requirements, and management fees billed monthly. G-P pays professionals according to country-specific statutory regulations. The company provides payments in over 135 currencies, crypto, and digital wallet compensation options.

~81% of G-P's clients are headquartered in North America or Latin America and seek support for compliant global workforce expansion. G-P maintains an industry-agnostic approach to client targeting, supporting clients across all industry sectors. The top two industries in its client base, representing ~88% of its client portfolio, are professional services and manufacturing.

The company is a founding member of the Global Employment Innovation Organization (GEIO).



Financials

G-P is a privately-held organization that does not publicly report its revenues. NelsonHall estimates that for the calendar year ending December 31, 2024, the company's total revenues attributable to its global employer of record services were approximately \$388.5m.

Strengths

- Continued commitment to technology-focused R&D and client-focused service models. Customer feedback, market research, and lessons learned as its products mature shape its AI-first platform and technology roadmap. G-P EOR, G-P Contractor, and G-P Gia apply GenAI and agentic AI to deliver compliant global workforce management solutions, further supporting current clients and attracting prospective buyers
- Robust strategic partner roadmap comprises more than 200 companies to meet current and anticipated future technology, client, worker, and strategic growth initiatives, including integrations to partner platforms
- Global infrastructure comprises a SOC 2-certified full technology stack and in-house HR, tax, and legal resources to support consistent service quality, minimized reliance on third-party ICPs, and data security
- Financial stability as a mature HR technology, EOR, and contractor services provider since 2012. Equity funding awards totaling \$350m secure continued technology advancements and international expansion initiatives
- G-P's client-centric operations and depth of in-country HR and legal experts provide crucial guidance and knowledge to clients implementing global growth and employment strategies.

Challenges

- G-P faces increased competition from less-established market entrants offering all-in-one global HCM and payroll solutions. In response, G-P is investing and building its internal technology proficiencies and partner network, highlighting the value of its capabilities and approach for HR, payroll, and HCM, and its focus on global employment and compliance
- Clients seek greater confidence in EOR and contractor management solutions to minimize risks associated with international employment compliance (e.g., country-specific employee termination rules, worker misclassification as a contractor and not an employee). G-P aims to reduce compliance risks through an optimal balance of human expertise and AI-enabled assistants.

Strategic Direction

G-P centers its product and solution offerings on the following differentiators:

- *Technology and AI innovation:* G-P offers a robust suite of products, including the Global HR Agent, G-P Gia, and AI-enabled EOR and Contractor products to hire and manage the full employee lifecycle
- *Scalable technology:* the company's SaaS platform enables a data strategy on which it can build intelligent products and solutions, including the complexity of 100k+ users across ~180 countries



- *Data and proprietary AI:* G-P's depth of data, based on domain expertise and real-world solutions, provides the foundation for its AI capabilities. The company's unified AI strategy delivers innovations and exceptional client experiences, including with G-P Assist and G-P Gia
- *Compliance:* G-P ensures end-to-end control over compliance, mitigating risks and avoiding fines, penalties, and litigation. The company maintains a 100% pass rate for audits, reviews, and investigations and a 0% customer litigation rate. G-P has not been subject to regulatory actions or fines
- *Customer satisfaction and support:* the company offers multiple support models, including 24/7 AI-powered support with real-time insights and compliance information. Clients maintain access to a Customer Success Manager to partner and counsel on all aspects of existing and future global expansion. Regional and local market support is also available 24/7 to provide HR and compliance support and advice to clients and professionals.

G-P's 2025 product strategy is to innovate and strengthen its core platform and solutions. It remains committed to technological advancements and client support, focusing on its GTM partner strategy by building enhanced integrations.

NelsonHall estimates that G-P invests 30%-40% of its global EOR revenues in R&D efforts, enriching its product line. Planned enhancements to G-P's product portfolio in the coming 12-18 months include enriching its G-P Gia and G-P Assist tools, enabling voice-enabled agentic AI, and further streamlining its global workforce management, market intelligence, self-service, and compliance capabilities within its G-P EOR and G-P Contractor offerings.

Outlook

G-P will continue to target emerging multinational firms and enterprises seeking support for compliant global workforce expansion, including direct, contract, and gig economy workers. The company will target first- and second-generation buyers, promoting its consulting capabilities and compliant EOR and contractor solutions. It will focus on maintaining a strong local market presence, ensuring consistent client and worker experiences.

Its industry segmentation varies by region, and primary targets will continue to comprise technology, professional services, and manufacturing companies, currently representing ~88% of its client portfolio.

G-P will strengthen and refine its partner network over the next 18-24 months to enhance its G-P EOR, G-P Contractor, and G-P Gia functionality and its holistic and advanced technology capabilities. It will expand its internal development teams and R&D investment, increasing its GenAI IP, specifically G-P Assist, and rationalize its network of third-party technology vendors. Leveraging feedback from its client advisory board, the company will assess the relevance and functionality of its intellectual property and product roadmaps.

It will continue to assess its service and pricing models, simplifying them to align with market needs, improve competitiveness, enable broader engagement with existing clients, trigger conversations with prospective buyers, and drive deeper recurring revenues and longer-term revenue retention among its clients.



Global Employer of Record Services Market Summary

Overview

As the legal employer of a company's global workforce, EOR vendors handle all HR responsibilities, such as onboarding, payroll, taxes, benefits administration, and legal compliance. The EOR service model reduces risks, costs, and time to market entry, giving firms a competitive advantage for those aiming to expand globally, explore new markets, or secure talent in new countries where they do not have an existing entity.

Vendors concentrate on building long-term client and channel partnerships, driving ARR, expanding geographic and industry expertise, and enhancing capabilities. Their service offerings and technologies continue to evolve, featuring open-source API-enabled platforms, GenAI assistants, and tiered product and pricing models that align with client buying maturity and organizational needs. Investment in technology and third-party partnerships across the global EOR services market remains robust as providers adapt strategies to keep pace with broader HR technology developments. The impact of advanced technologies including GenAI is fostering more third-party technology partnerships, which accelerate the deployment of tech stacks and staffing capabilities.

The global EOR service offering continues to evolve, emphasizing tech-enabled international expansion as its core while shifting from a transactional solution to a strategic enabler. Product portfolios are expanding, offering strategic consulting and industry-specific services, including enhanced HR services and technology support for the entire employee lifecycle—covering talent sourcing, recruiting, background screening, visa support/mobility services, EAPs, M&A consulting and transition services, equity management, and logistics. Complementary services, such as contractor management and global expansion consulting, are becoming increasingly common among vendors.

GenAI investment and maturity vary among vendors, as product roadmaps are influenced by mission statements, equity funding, third-party partnerships, and internal technology teams. The rapid growth of GenAI and agentic AI is pushing vendors to innovate swiftly while carefully considering the ethical risks and industry regulations surrounding the responsible use and application of these technologies. Although technology remains a key differentiator among vendors, with GenAI, predictive and prescriptive analytics, and extreme personalization as top priorities on their technology roadmaps, there is agreement that a careful balance must be maintained between adopting new technology and human interaction.

To decrease dependence on partners, EOR vendors are targeting African, Middle Eastern, and Central/Western European countries for expanding service centers and local operations, enhancing internal compliance knowledge bases, and transitioning from an indirect EOR model to hybrid and direct approaches.

Economic instability is expected to continue in 2026. Contributing factors include geopolitical and regional conflicts, concerns about inflation, risks of recession, and recent U.S. government decisions on tariffs and immigration policies. These issues continue to create business uncertainty, prompting organizations and vendors to seek essential workers and specialized skills from countries where they may not have an established presence. Consequently, the demand for EOR services grows as organizations increasingly recognize the benefits of this model.



Buy-Side Dynamics

Primary drivers for organizations to engage with a global EOR vendor include:

- Navigating and maintaining compliance with quickly evolving statutory HR and payroll regulations globally
- Ensuring compliant international payroll, contractor pay administration, and benefits
- Minimizing or removing the costs, effort, and risks involved in navigating the complex process of establishing legal entities and operations in foreign countries
- Maintaining direct access to knowledgeable HR, legal, and payroll experts to support workforce cost modeling and international expansion strategies.

Buyers indicate that having direct access to local HR and legal compliance expertise, along with reliable and compliant international HR and payroll services, remains the most critical desired outcome of global EOR outsourcing. Proactive vendor engagement, including early mitigation strategies to prevent potential compliance issues, is rated highest for potential vendor impact.

As buyers gain a better understanding of EOR services, vendor organizations are developing dedicated client success teams and client advisory boards, which in turn influence product development and technology roadmaps. This shift reflects the growing maturity of the global EOR market, increased strategic client engagement, and recent C-suite appointments. Vendors use data and strong client relationships to create flexible and scalable solutions that meet current and future client needs.

EOR buyers indicate that critical vendor selection factors include country coverage supporting future global expansion and gaining direct access to qualified resources for navigating in-country HR, legal, and payroll regulations to maintain a compliant international workforce.

Market Size & Growth

The EOR services market is estimated to be worth ~\$3,133m in 2025, with growth driven by international business expansion, access to required talent pools, and buyers' efforts to minimize risk by ensuring HR and payroll compliance.

NelsonHall estimates that the global EOR market will grow at ~17.3% per annum to reach ~5.9bn in 2029.

Challenges & Success Factors

The increase in remote working has led to a surge of new market entrants, each offering distinct services, experiences, and value propositions. Some market players provide basic EOR services with competitive pricing in specific countries or regions. In contrast, others focus their products and messaging on compliance, tech-enabled solutions, and additional value-added services that benefit clients. Technology infrastructure and product offerings from recent market entrants (such as those established during the pandemic) now compete evenly with those of more mature vendors, as vendor capabilities across the EOR landscape are leveling out.



As the market matures, EOR vendors are encountering peripheral threats and challenges for various sources, including:

- Second-generation EOR buyers who may have experienced poor service quality with other vendors
- Buyers increasingly knowledgeable about EOR services and recent litigation; they look for more confidence in EOR vendor solutions to reduce risks related to international employment
- The rapid emergence and evolution of GenAI and agentic AI, prompting vendors to innovate and carefully balance ethical risks against industry regulations related to responsible technology use
- Cost oppression in response to global economic uncertainty, with buyers expecting premium service levels at lower, highly competitive price points
- Global EOR vendors, particularly newer market entrants, face competition from multiple sources, including providers focused solely on technology-based or all-in-one HCM solutions, vendors in adjacent markets, e.g., payroll providers, and local competitors with limited multi-country experience
- New leadership appointments, M&A activity, and aggressive product roadmaps across the EOR market continue apace, yielding new strategies and requiring some EOR vendors to balance reorganization efforts while remaining focused on existing client programs
- The volume of EOR vendors with diverse experience and offerings requires buyers to carefully evaluate capabilities amid marketing hype, prompting vendors to increase BD investment to highlight their value propositions, compliance expertise, global reach, and product portfolios.

Vendor success depends on compliant in-country coverage and support, proper employee classification, deployment of qualified personnel, and the right mix of technology and direct engagement with clients and employees by capable resources, including human resources and advanced technology.

Outlook

The future of global EOR services will focus on utilizing GenAI to enhance self-service convenience, improve workforce management efficiency, and provide real-time insights that ensure compliance.

The global EOR market is projected to grow at ~17.3% CAAGR, reaching a net value of about \$5.9 billion by 2029. North American-based companies are expected to remain the primary target as early adopters of worldwide EOR services. However, Africa, the Middle East, and APAC will present strong opportunities for acquiring new clients and expanding talent pools.

~68% of client organizations surveyed plan to expand globally within the next two years, with LATAM and South American countries identified as targets by ~77% of client respondents. APAC and European countries will also be high-priority targets as buyers seek compliant access to qualified resources.

Growth sectors expecting increased adoption include energy, renewables, healthcare, and professional services roles as AI influence expands and vendors target recession-resistant industries. Vendor targets are expanding beyond geographies, market segments, and industries to support strategic transformation initiatives, including M&A transactions, divestitures, and international expansion.



Future expansion strategies for buyers are divided, with 50% indicating they will continue applying an EOR model, while 50% will transition capabilities in-house and establish an in-country entity, providing greater global expansion consulting opportunities for vendors.

The use of GenAI and agentic AI will become common among EOR vendors, offering self-service convenience, real-time insights into employment, payroll, and compliance, and providing comprehensive employee lifecycle technology and services. Investment and maturity levels in GenAI vary among vendors, as product roadmaps are influenced by mission statements, funding, third-party partnerships, and internal tech teams. However, ongoing relationship management and engagement remain vital differentiators and key factors for buyers. As GenAI becomes widespread in vendor solutions, dedicated client success managers will continue to oversee relationships, ensuring client value, and encouraging service and technology adoption as clients' needs and businesses evolve.



NEAT Methodology for Global Employer of Record Services

Nelson Hall's (vendor) Evaluation & Assessment Tool (NEAT) is a method by which strategic sourcing managers can evaluate outsourcing vendors and is part of NelsonHall's *Speed-to-Source* initiative. The NEAT tool sits at the front-end of the vendor screening process and consists of a two-axis model: assessing vendors against their 'ability to deliver immediate benefit' to buy-side organizations and their 'ability to meet future client requirements'. The latter axis is a pragmatic assessment of the vendor's ability to take clients on an innovation journey over the lifetime of their next contract.

The 'ability to deliver immediate benefit' assessment is based on the criteria shown in Exhibit 1, typically reflecting the current maturity of the vendor's offerings, delivery capability, benefits achievement on behalf of clients, and customer presence.

The 'ability to meet future client requirements' assessment is based on the criteria shown in Exhibit 2, and provides a measure of the extent to which the supplier is well-positioned to support the customer journey over the life of a contract. This includes criteria such as the level of partnership established with clients, the mechanisms in place to drive innovation, the level of investment in the service, and the financial stability of the vendor.

The vendors covered in NelsonHall NEAT projects are typically the leaders in their fields. However, within this context, the categorization of vendors within NelsonHall NEAT projects is as follows:

- **Leaders:** vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements
- **High Achievers:** vendors that exhibit a high capability relative to their peers to deliver immediate benefit but have scope to enhance their ability to meet future client requirements
- **Innovators:** vendors that exhibit a high capability relative to their peers to meet future client requirements but have scope to enhance their ability to deliver immediate benefit
- **Major Players:** other significant vendors for this service type.

The scoring of the vendors is based on a combination of analyst assessment, principally around measurements of the ability to deliver immediate benefit; and feedback from interviewing of vendor clients, principally in support of measurements of levels of partnership and ability to meet future client requirements.

Note that, to ensure maximum value to buy-side users (typically strategic sourcing managers), vendor participation in NelsonHall NEAT evaluations is free of charge and all key vendors are invited to participate at the outset of the project.



Exhibit 1

‘Ability to deliver immediate benefit’: Assessment criteria

Assessment Category	Assessment Criteria
Offering	<ul style="list-style-type: none"> Core Global EOR service offerings and capabilities Consulting and advisory for international expansion Multi-country HR and payroll compliance support and services Expense management for international workers Contractor management and contractor pay services Benefits administration services for international workers Talent sourcing services Enabling technology leveraged in EOR services delivery Integrations (APIs) to connect 3rd party solutions Integration of advanced HR technologies, including GenAI Broader HR service offerings
Delivery	<ul style="list-style-type: none"> North America Continental Europe Middle East/Africa APAC LATAM Increased agility and flexibility Proactive team engagement and service delivery Scalability Access to Specialist EOR Resources Leveraging intelligent, AI-enabled EOR platforms Data and analytics-driven insights Continuously updated expertise
Presence (Employees, Proportion of Revenues)	<ul style="list-style-type: none"> EOR client size mix EOR Enterprise client revenue percentage EOR Medium size client revenue percentage EOR Small size client revenue percentage North America EMEA APAC LATAM
Benefits Achieved	<ul style="list-style-type: none"> Reduced time-to-hire Improved compliance Reduced costs Improved data quality and HR analytics Improved user experience with technology platforms Overall level of benefit achievement



Exhibit 2

‘Ability to meet client future requirements’: Assessment criteria

Assessment Category	Assessment Criteria
Service Culture	Ability to Reimagine Product and Service Offerings (Design Thinking) Caliber of Personnel Ability to meet future geographic footprint
Roadmap Execution & Plans	Digitization/Transformation Capability Range of EOR and Evolving Service Offerings Broader HR service offerings/holistic HR approach

For more information on other NelsonHall NEAT evaluations, please contact the NelsonHall relationship manager listed below.



Sales Inquiries

NelsonHall will be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager:
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