NEAT EVALUATION FOR G-P:

Global EOR Services

Market Segments: Overall, EOR Product Innovation

Introduction

This is a custom report for G-P (formerly Globalization Partners) presenting the findings of the 2026 NEAT vendor evaluation for *Global Employer of Record (EOR) Services* in the *Overall* and *EOR Product Innovation* market segments. It contains the NEAT charts of vendor performance, a summary vendor analysis of G-P for global EOR services, and the latest market analysis summary.

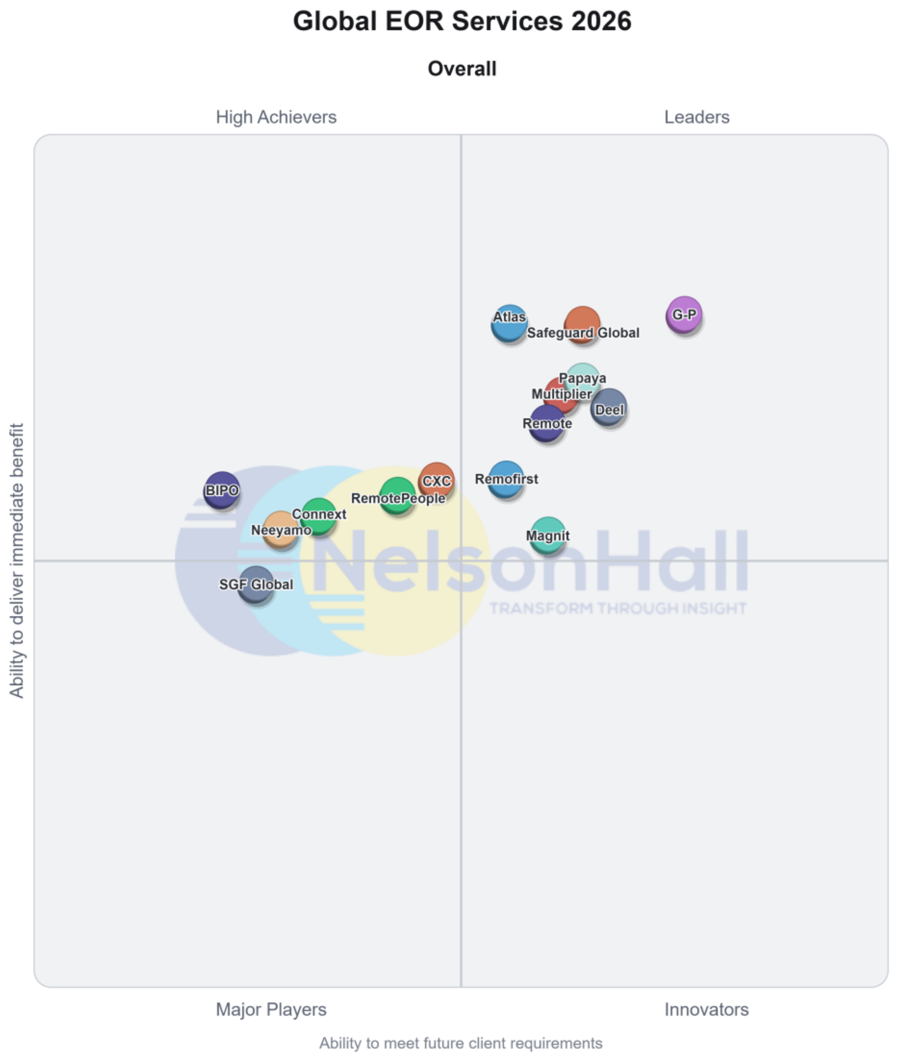
This NelsonHall Vendor Evaluation & Assessment Tool (NEAT) analyzes the performance of vendors offering global EOR services. The NEAT tool allows strategic sourcing managers to assess the capability of vendors across a range of criteria and business situations and identify the best performing vendors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

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, Connext Global, CXC Global, Deel, G-P, Magnit, Multiplier, Neeyamo, Papaya Global, Remofirst, Remote, RemotePeople, Safeguard Global, and SGF Global.

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

NEAT Evaluation: Overall

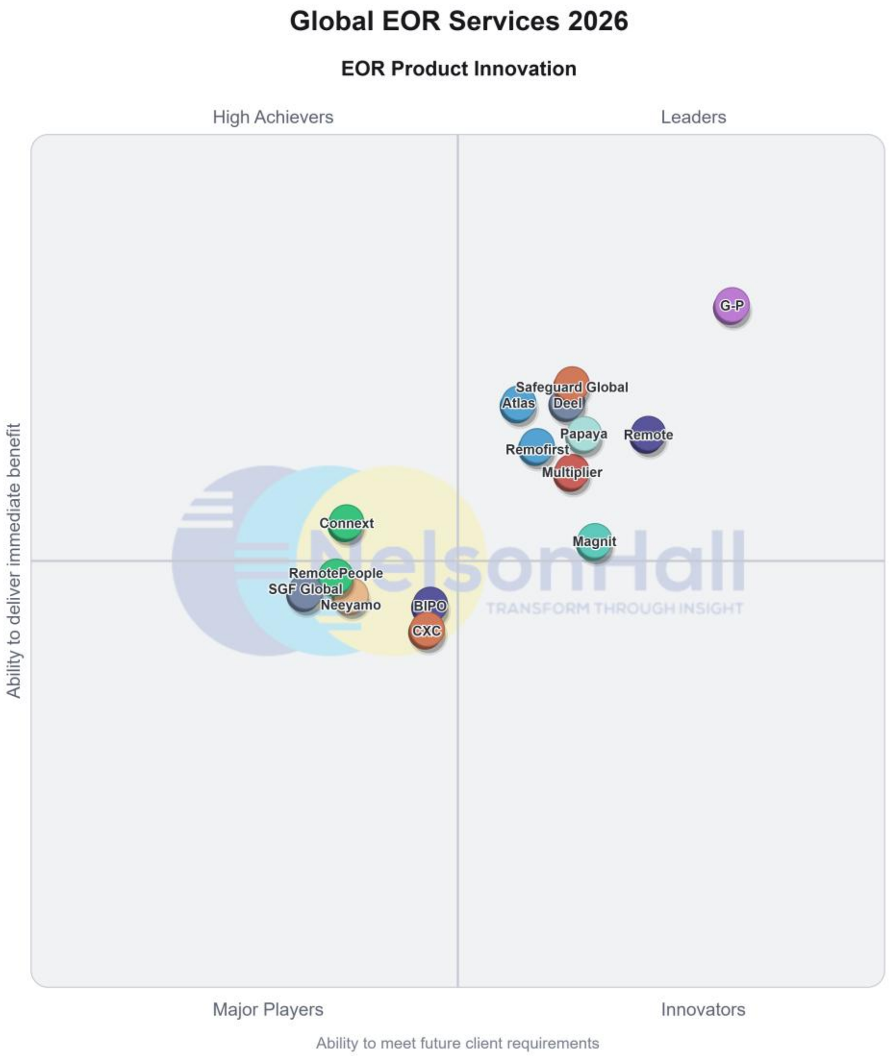


NelsonHall has identified G-P as a Leader in the *Overall* market segment, as shown in the NEAT chart. This market segment reflects G-P's overall ability to meet future client requirements as well as delivering immediate benefits to its global EOR services clients.

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 EOR Services* NEAT tool here.

NEAT Evaluation: 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.

Buy-side organizations can access the *Global EOR Services* NEAT tool here.

Vendor Analysis Summary for G-P

Overview

Headquartered in Boston, G-P was founded in 2012 by CEO and Executive Chair Nicole Sahin, who identified opportunities to help organizations navigate the complexities of global expansion and staffing. It provides EOR and global employment solutions for full-time employees and contractors, including in-country legal, advisory, HR, tax, and payroll expertise, delivery resources, compliance, and AI-enabled global expansion and compliance tools.

The company operates through owned entities in 100 countries and maintains capabilities in 180 countries, and offers payroll and payment solutions in ~150 currencies. The company maintains a vendor ecosystem of more than 200 partners, including technology partnerships with HR, payroll, and HCM providers to enhance its technology stack and offer adjacent services.

G-P provides solutions across sectors, supporting the full employee lifecycle, enabled by its own IP built on its SaaS and AI platform, which has codified the company's 14+ years of proprietary data and knowledge. G-P’s global employment products include the following:

- *G-P EOR*, enabling companies to hire, onboard, and manage employees across 180+ countries. Using agentic AI, G-P EOR automates localized contract generation, benefits administration, and multi-currency payroll, and provides pre-built and bespoke integrations with leading HCM and payroll providers
- *G-P Contractor*, providing clients and contractors with access through a single platform and supporting all phases of contractor management, including hiring, compliance, and payments
- *G-P Gia*, G-P’s global HR agent, providing context-specific HR and legal guidance and actionable documents across ~50 countries. Its compliance data are continually validated and updated from G-P-verified sources and are not trained on open-source data.

G-P employs about 400 delivery staff and operates 100 legal entities, providing EOR support in 19 languages for employees, contractors, and clients. The company continuously evaluates local laws and regulations through automated intelligence and in-country expertise.

Financials

NelsonHall estimates G-P’s 2025 total revenues attributable to its EOR services to be $429m. EOR revenues are derived primarily from North American-headquartered companies (mostly small- and mid-sized firms), with ~79% of revenue derived from the technology, professional services, and biotechnology sectors.

Strengths

- Scalable AI-first platform and technology roadmap, with G-P EOR, G-P Contractor, and G-P Gia applying GenAI and agentic AI to deliver compliant global workforce management solutions. G-P Pay and G-P Wallet support payroll, on-demand payments, and financial wellness for employees and contractors
- G-P's partner ecosystem and marketplace include over 200 companies to support current and anticipated technology, client, worker, and strategic growth initiatives, including integrations with partner platforms
- Proprietary compliance data and an IP framework with G-P-verified sources, providing a network of HR and legal experts.

Challenges

- Balancing human-in-the-loop and technology strategies to secure 'boomerang clients' who previously had poor experiences with technology-only EOR vendors
- Aligning AI roadmap projects and strategic partnerships to expand its product portfolio and meet the diverse needs of employee and contractor workforces.

Strategic Direction

G-P's strategy focuses on expanding the use of agentic AI, enriching the marketplace, integrating with enterprise applications, and applying AI within workflows, including the following:

- Agentic AI expansion
- Reseller capabilities
- Agent-to-Agent (A2A) protocols
- Entity footprint growth
- API and developer portal enhancements
- Contractor-to-FTE workflows.

Global EOR Services Market Summary

Overview

The EOR service model reduces risk, costs, and time to market entry, giving firms a competitive advantage when expanding globally, entering new markets, or securing talent in countries where the firm does not have an entity. As the legal employer of a firm's global workforce, EOR vendors handle all HR responsibilities, including onboarding, payroll, taxes, benefits administration, and legal compliance.

Vendors focus on third-party partnerships and acquisitions to drive ARR, expand geographic reach and industry expertise, and enhance capabilities. Increasingly, EOR offerings include solutions for both employee and non-employee workers, along with related HR services. Vendor differentiation strategies and GTM messaging highlight specializations and engagement philosophies and educate buyers on the benefits of the EOR model.

The global EOR service offering continues to evolve, with a focus on balancing human and AI-enabled engagement. Vendor strategies and solutions are shifting from transactional services to strategic enablement. Product portfolios are expanding to include strategic consulting and industry-specific services for employee and non-employee populations, including AOR, COR, and contingent workers. Adjacent HR services and technology are being added to support the entire employee lifecycle and drive client satisfaction and worker retention, including talent sourcing, mobility services, and professional development.

GenAI roadmap projects underscore the importance of human-in-the-loop accessibility, yet agent engagement strategies vary across the continuum. Investment levels, vendor maturity, and engagement approaches differ among vendors, and mission statements, equity funding, and third-party partnerships shape GenAI vision. EOR vendors apply agentic AI to support worker onboarding, offboarding, and low-risk inquiries. Vendors integrate GenAI and conversational AI to strengthen compliance, using technology to scan public and proprietary compliance knowledge bases and provide real-time insights and proactive warnings when country regulations change. As AI applications increase, buyers expect vendors to provide greater transparency into roadmap projects and current AI use.

Many EOR vendors are reducing reliance on partners, targeting APAC for GCC expansion, establishing in-country entities to secure local expertise and maintain service quality, enhancing internal compliance knowledge bases, and transitioning from an indirect EOR model to hybrid and direct approaches.

Economic instability and geopolitical conflicts 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, demand for EOR services is growing as organizations increasingly recognize the benefits of this model.

Buy-Side Dynamics

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

- Maintaining regulatory compliance across multiple countries
- Limited internal bandwidth to support international talent acquisition, HR, and payroll
- Minimizing or removing the costs, effort, and risks involved in navigating the complex process of establishing legal entities and operations in foreign countries

- Onboarding and managing employee and non-employee talent
- Accelerated hiring and global expansion requirements.

Buyers indicate that HR and payroll compliance, along with payroll reliability, remain the top desired outcomes of the EOR service model. Buyers also rate these outcomes as having the highest potential impact from vendors. Some buyers cite customer service responsiveness, reporting capabilities, and platform functionality as areas vendors should assess and improve.

Buyers cite critical vendor selection factors, including value for money, service quality, a demonstrated approach to HR and payroll compliance, and solution agility and flexibility. These criteria underscore the importance of a proactive, consultative approach to client engagement.

Market Size & Growth

The net value of the global EOR services market is estimated at ~$3,577m in 2026, 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 ~14.3% per annum to reach a net value of ~$7.1bn in 2031.

In 2026, EOR growth in manufacturing, particularly in high-tech manufacturing, and in the professional services sectors reflects rising demand for knowledge workers as AI's influence grows. These segments account for ~54.2% of EOR revenue.

Multinational companies of all sizes will remain the primary targets for EOR services, with ~44% of users in the small segment (<500 employees). Mid-market adoption is accelerating and is expected to account for 40% of 2026 EOR revenues. The model gives mid-market firms enterprise-level reach, pay, and benefits without the investment or delays required to establish local infrastructure.

Challenges & Success Factors

Remote and hybrid work models continue to attract new market entrants and drive acquisitions. Each vendor offers distinct services, experiences, and value propositions. Some offer competitively priced tech-only EOR services. Others target specific regions or countries. Still others focus their products and messaging on a human+tech approach to international expansion. Ultimately, in the crowded EOR segment, increased GTM and advertising investments are supporting buyer and market education, as well as differentiation strategies that promote specialization and engagement philosophies.

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

- "Boomerang buyers", second-generation EOR buyers who may have experienced poor service quality previously and are raising the bar during subsequent procurement cycles, applying lessons learned to validate vendor capabilities
- Prospects and clients seeking greater confidence in EOR vendor solutions to minimize risks associated with international employment compliance, requiring vendors to educate sourcing teams on the potential risks and liabilities associated with compliance, specifically worker classification, after a contract has been signed
- Aligning AI roadmap projects and strategic partnerships to expand product offerings while meeting the diverse needs of employee and contractor workforces (make vs. buy/marketplace)

- Cost pressure in response to global economic uncertainty and buyers expecting premium service levels at lower, highly competitive price points
- The job impacts of AI displacement are leading buyers to question the ROI of GenAI-enabled solutions.

Despite differences in segment maturity, AI adoption, and product offerings, compliance remains central to EOR solutions and vendor messaging. Ultimately, vendor success will depend on compliance, in-country regulatory expertise, the right mix of technology and direct engagement with clients and workers by capable resources, and differentiation beyond price.

Outlook

The future of global EOR services will focus on global expansion advisory services and talent solutions for employee and non-employee populations.

The global EOR market is projected to grow at a ~14.3% CAGR, reaching about $7.1bn by 2031. North American-headquartered firms will remain the primary adopters of EOR services. Africa, the Middle East, and South America will increasingly offer access to skilled, multilingual talent pools.

Approximately 77% of surveyed client organizations plan to expand globally within the next two years, with APAC and Continental European countries identified as targets. MEA and LATAM countries will also be high-priority targets, given the availability of skilled talent, competitive labor costs, time zone alignment, and cultural and linguistic similarities.

Future expansion strategies are split among buyers, with 63% stating they will continue to partner with an EOR to support international expansion, while 37% state they will establish in-country entities. Of those planning to establish in-country entities, 36% indicate they will partner with an EOR vendor for new-entity setup, creating opportunities for vendors to guide global expansion.

Differentiation strategies will continue at pace as vendors seek to highlight their specializations and engagement philosophies and to educate buyers about the benefits of the EOR model. The refreshed messaging reflects the offering's continued maturity and strategic value beyond a remote staffing approach.

GenAI roadmaps will reflect vendors' value propositions, with some eliminating all human-agent engagement and others optimizing AI to improve the efficiency of manual tasks and to support high-consequence regulatory monitoring and compliance enforcement. Proactive, consultative engagement remains a vital differentiator and key factor as buyers seek vendor expertise, lessons learned from other client programs, and unsolicited recommendations to optimize both immediate and longer-term talent strategies.

NEAT Methodology for Global EOR 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	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	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)	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	Reduced time-to-hire/onboard 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.

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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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