# THALES

## 2025 | COMPANY OF THE YEAR

*Driving impact across the customer value chain*

### RECOGNIZED FOR BEST PRACTICES IN THE GLOBAL AUTOMATED BORDER CONTROL EGATES INDUSTRY

FROST & SULLIVAN

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## Best Practices Criteria for World-class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Thales excels in many of the criteria in the ABC eGates space.

## RECOGNITION CRITERIA

| Visionary Innovation & Performance | Customer Impact |
| --- | --- |
| Addressing Unmet Needs | Price/Performance Value |
| Visionary Scenarios Through Megatrends | Customer Purchase Experience |
| Leadership Focus | Customer Ownership Experience |
| Best Practices Implementation | Customer Service Experience |
| Financial Performance | Brand Equity |

## ABC eGates: Balancing Security and Seamless Border Crossings

The international travel landscape has undergone a profound transformation in recent decades. A surge in global passenger volume, projected to expand continuously, places unprecedented pressure on border control agencies to balance two seemingly conflicting mandates: ensuring national security against increasingly sophisticated threats and providing a seamless, efficient experience for legitimate travelers.[1] Likewise, the International Air Transport Association expects international air passenger traffic alone to reach 8.5 billion by 2039, nearly doubling 2019 levels.[2] The traditional model of manual passport and identity verification, once the universal standard, has proven inadequate to meet the demands of the modern era, often leading to long queues, operational inefficiencies, and a passenger experience fraught with friction.

This challenge gave rise to the automated border control (ABC) electronic gate (eGate), a technological evolution designed to enhance the border crossing process. The initial adoption of eGates, spurred by the integration of biometric data into electronic passports, marks a major shift towards self-service and automation. However, this first wave of innovation was not a panacea. Border agencies and airport operators continue to face significant hurdles, including the high costs of system integration and cyberattack risks. Furthermore, the rollout of comprehensive regulatory mandates, such as the European Union's (EU) Entry/Exit System (EES), introduces new layers of complexity. The EES, which replaces manual passport stamping with a digital record of entries and exits, including mandatory biometric capture (fingerprints and facial images) for non-EU nationals, requires a fundamental overhaul of border

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[1] https://documents1.worldbank.org/curated/en/986291468192549495/pdf/588450PUB0Bord101public10BOX353816B.pdf

[2] https://timesofindia.indiatimes.com/business/airline-industry-sees-long-term-rebound-for-sector/articleshow/83476885.cms

infrastructure and processes, demanding solutions that are not only compliant but also highly efficient to manage passenger flow.[3]

The ABC eGates technology is now in a new phase of innovation, addressing security and regulatory pressures with advancements in artificial intelligence (AI), machine learning, and sophisticated biometric technologies. Modern systems go beyond simple document reading to offer a truly contactless and intelligent screening process, essential for meeting mandates like the EES. AI-powered platforms can now analyze vast datasets in real-time, enabling predictive risk assessment and identifying anomalies that would be imperceptible to human agents.[4] Advanced facial and iris recognition, enhanced with liveness detection to prevent spoofing, provides the high degree of security and accuracy required for large-scale biometric registration, significantly reducing processing times to mere seconds. This technological leap addresses the challenges of security and efficiency, allowing border authorities to focus resources on high-risk cases while low-risk travelers enjoy a fluid "walk-through" experience.

> *"Today, it offers comprehensive, modular, and high-performance ABC eGates designed to address evolving operational and security challenges at international borders. Thales's systems incorporate advanced features such as multi-configuration gates, single person detection technology, high-speed travel document scanning, and on-the-fly face capture, delivering one of the fastest processing times in the market: under 15 seconds per traveler."*
>
> *- Rabin Dhakal*
> *Best Practices Research Analyst*

Thales is a significant ABC eGates innovator, developing and deploying comprehensive solutions that integrate robust document verification, multi-modal biometrics, and intelligent backend systems. The company is a key contributor to projects like the EU EES and a trusted provider to governments globally. Thales leverages its security and identity expertise to create scalable solutions that meet the imperatives of national security and traveler convenience. Its work is instrumental in creating a border control framework that is secure, efficient, and centered on improving the passenger journey from check-in to boarding.

### Solving Border Security Pain Points with Modular, Scalable ABC eGate Systems

Thales drives technological advancement in ABC systems. Founded as Thomson-CSF in 1968 and rebranded as Thales in 2000, the company has built a formidable reputation in the aerospace, defense, and digital security sectors. With over 15 years of active engagement in government security technologies, it continues to deliver sophisticated solutions for document issuance, identity verification, border clearance, and citizen registration globally. Thales boasts a deep-rooted expertise in document authentication and biometric verification technologies, including facial, fingerprint, and iris recognition with liveness detection. The company strengthened its capabilities with the strategic acquisition of Gemalto in 2019, a leading provider of smart cards, identity credentials, biometrics solutions and digital identity services. Additionally, Thales completed the acquisition of Imperva, with the objective to helping organizations discover and protect sensitive data anywhere, manage access and secure all paths to it. Today, it offers comprehensive, modular, and high-performance ABC eGates designed to address evolving

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[3] https://home-affairs.ec.europa.eu/policies/schengen/smart-borders/entry-exit-system_en
[4] https://www.openaccessgovernment.org/ai-for-broader-control-speed-and-security/187217/

operational and security challenges at international borders. Thales's systems incorporate advanced features such as multi-configuration gates, single person detection technology, high-speed travel document scanning, and on-the-fly face capture, delivering one of the fastest processing times in the market: under 15 seconds per traveler.[5] As border authorities globally grapple with rising passenger volumes, regulatory compliance, and sophisticated identity fraud attempts, the company leads by providing reliable, scalable, and future-ready ABC solutions that boost border security and traveler convenience.

Thales demonstrates an acute understanding of customer pain points and translates these insights into advanced, purpose-built solutions. The company has strategically identified two of the most critical unmet needs faced by border authorities today: the rapid escalation of sophisticated security threats and the eruption in international passenger volumes. Thales is actively addressing these challenges. A pivotal move in this direction was the strategic acquisition of Gemalto, which strengthens the company's biometric and digital identity capabilities.[6] The integration of Gemalto's extensive digital identity portfolio with Thales's existing security assets positions as a one-stop partner for secure, end-to-end border control infrastructure. This holistic offering spans document issuance, real-time identity verification, biometric authentication, and seamless integration with national and international databases.

Furthermore, Thales addresses operational bottlenecks and infrastructure limitations through its flexible, modular ABC eGate solutions. The company recognizes that different border points have varied physical layouts, security protocols, and passenger traffic patterns. In response, it offers multiple gate configurations. These include a high-security two-door "mantrap" model for sensitive entry points and a compact one-door model for space-constrained or lower-security environments. This adaptability ensures that border authorities can tailor infrastructure to their specific operational needs without compromising security standards or passenger throughput.

**Thales's Two-door eGate Model**



*Source: Thales*

In addition, Thales guarantees tangible performance enhancements through its best-in-class facial recognition software, achieving matching times of under two seconds, and industry-leading document

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[5] Thales Presentation Deck

[6] https://www.thalesgroup.com/en/markets/digital-identity-and-security

authentication systems capable of central updates and remote configuration.[7] This capacity ensures operational continuity, rapid deployment of new travel document formats, and a streamlined process for border officers. By systematically identifying and resolving such previously underserved operational and security challenges, the company generates significant value for clients.

Thales builds its market leadership on a foundation of end-to-end solution design, modular infrastructure, and integrated identity management ecosystems. A hallmark of the company's best practices is its three-tiered ABC solution framework, comprising the ABC eGate, the ABC Operational Monitoring Station, and the ABC Border Administration System. This comprehensive architecture ensures seamless coordination between automated passenger processing, operational oversight, and system configuration management. The inclusion of a national backend system with real-time interconnections to national and international databases demonstrates Thales's commitment to operational transparency, security compliance, and information continuity, which are essential in today's border control environments.

From a process perspective, Thales prioritizes continuous adaptability and future-readiness. The company's modular hardware designs and multi-configuration options enable authorities to adjust floor layouts, passenger flow models, and security levels without disrupting core operations. Additionally, its industry-recognized document authentication system allows border guards to centrally update verification protocols and incorporate new document types in the field, ensuring swift adaptation to evolving regulatory mandates and travel document standards.

Crucially, Thales also integrates AI-powered biometric verification with liveness detection and intuitive on-the-fly facial capture systems, optimizing security and passenger convenience. The company supports these innovations with operational tools that provide real-time monitoring dashboards for border officers and configuration flexibility for national administrators, ensuring a scalable and repeatable framework adaptable to diverse geopolitical and operational landscapes.

Frost & Sullivan commends Thales's rigorous, well-orchestrated innovation strategy, combining advanced technology, operational best practices, and client-centric configurability to deliver high-performance, reliable, and scalable ABC solutions.

### Building a Compliant and Connected Border Security Ecosystem for Smooth Travel Experiences

Thales is a master integrator of the digital border ecosystem. Through targeted investments in core technology pillars and proactive regulatory alignment, the company establishes a competitive moat that is difficult for competitors to replicate. A foundation of Thales's leadership strategy is its bold investment in enabling seamless, end-to-end passenger journeys. The "Fly to Gate" concept, a flagship initiative that integrates a traveler's biometric identity with their travel documentation from initial check-in to final boarding. The company invests heavily in this connected ecosystem, spanning self-service kiosks, mobile apps, and eGates, ensuring that passengers can navigate the entire airport process using a secure, single digital identity. This initiative enhances operational efficiency for airports and airlines and raises the industry standard for biometric-driven, touchless border processing. Likewise, Thales's emphasis on system interoperability and open-architecture platform development futureproofs its deployments,

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[7] https://www.thalesgroup.com/en/markets/digital-identity-and-security/government/eborder/egates

enabling seamless integration with existing airline, airport, and government systems while maintaining readiness for forthcoming digital identity frameworks.

Equally instrumental to its market leadership is Thales's focused investment in advanced biometrics and AI-powered identification technologies. Its pioneering multi-modal biometric systems (such as its Multimodal Biometric Pod, which combines high-resolution facial and iris recognition[8]) addresses evolving identity verification challenges with higher accuracy, reliability, and operational flexibility. Incorporating AI and machine learning capabilities improves system resilience through advanced liveness detection, predictive analytics, and real-time anomaly detection.

Additionally, Thales demonstrates market foresight through its regulatory alignment strategy. The company makes significant investments to ensure its ABC product suite is fully compliant with upcoming global border control mandates, particularly the EU EES. Thales builds its EES-ready portfolio, encompassing eGates, kiosks, and a comprehensive border management system, to meet the EU's stringent biometric and data management requirements. This capability positions the company as a preferred technology partner for European authorities and sets a benchmark for regulatory readiness in other international markets preparing for similar reforms.

From a deployment perspective, Thales strengthens its leadership focus with a diversified global footprint, operating across more than 30 border points worldwide.[9] The company's expansive presence spans Europe, the Middle East, Latin America, Africa, and North America, with landmark projects including the deployment of several hundred eGates and hundreds of EES kiosks in France, Spain and Belguim.[10]

Frost & Sullivan admires Thales's strategic initiatives that reflect a disciplined leadership focus designed to establish the company as the preeminent provider of next-generation border security solutions while building durable competitive advantages that limit market access for new entrants.

### Maximizing ROI and Operational Efficiency with Responsive Global Support

Through decades of continuous investment in research and development, Thales masters the entire value chain of ABC systems, including face pods, document readers, document verification software, and biometric capture systems, allowing it to optimize performance and cost efficiency for its clients. A notable differentiator lies in the company's ability to improve biometric capture performance with speed and accuracy while integrating certified presentation attack detection to mitigate fraud risks. These innovations raise security standards and contribute to smoother, faster passenger experiences. The evolution of its ABC eGate systems, from the initial second-generation deployment in 2017 to the latest fourth-generation release, demonstrates Thales's emphasis on delivering tangible performance enhancements while preserving cost-effectiveness. The company also applies a security-by-design philosophy, embedding cybersecurity features at every layer of its eGates, from encrypted hardware to secure communication protocols and fortified backend management systems. This integrated approach eliminates the need for costly add-on security measures often found in competing solutions, delivering long-term operational savings and superior risk mitigation.

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[8] https://dis-blog.thalesgroup.com/identity-biometric-solutions/2023/01/16/multimodal-biometrics-the-future-of-travel-technology/

[9] Thales Presentation Deck

[10] Ibid.

Additionally, Thales prioritizes eco-conscious engineering as part of its responsible innovation strategy. By adopting lightweight, high-quality aluminum (including recycled content) and reducing product weight by 50%,[11] the company improves product sustainability and shipping/installation efficiencies. The modular design extends the product lifespan to over 10 years,[12] while supporting fast component replacement, further reducing lifecycle costs.

Thales delivers outstanding customer experience, characterized by seamless client collaboration, high system availability, rapid deployment support, and proactive partnership management. The company's deep-rooted presence in critical infrastructure sectors such as defense and cybersecurity positions is to approach customer service with a high-stakes, mission-critical mindset.

Thales works closely with the national Ministries of Interior, airport operators, and system integrators. Through partnerships with entities like Aéroport de Paris, AENA and Adani Airport Holdings, the company ensures it tailors its ABC solutions to technical specifications and evolving operational, regulatory, and policy requirements. The collaboration with Zelenza and the Spanish Ministry of Interior for deploying over 1,500 Manual Border Control Inspection units further illustrates its customer-centric approach.[13] By integrating Thales's devices, such as document readers, face pods, and fingerprint scanners, with custom-developed EES border clearance software, the company guarantees a coherent and high-quality end-user experience at every border control point.

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> **- Rabin Dhakal**
> **Best Practices Research Analyst**

Beyond technical support, Thales's customer service infrastructure emphasizes fast, efficient system rollouts, ensuring service excellence. For instance, its joint venture with Inetum facilitated the successful integration and deployment of ABC systems across multiple Spanish airports, including Madrid, Barcelona Reus, Girona-Costa Brava, Valencia, Bilbao, and Tenerife Sur.[14] The company's operational model ensures stress-free, rapid implementation, reducing disruption to existing airport operations and delivering immediate performance benefits.

Moreover, Thales supports global deployments across Europe, the Middle East, Latin America, and India with a network of trusted local partners and technical experts, guaranteeing high availability and responsive after-sales support in diverse operational environments. The ability to reduce passenger processing times by up to 30% at India's busiest airports[15] while maintaining system uptime and reliability highlights the company's commitment to delivering top-notch technology and high-quality customer experience.

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[11] https://www.thalesgroup.com/sites/default/files/database/document/2024-06/gov-eborder-abc.pdf

[12] Ibid.

[13] https://www.thalesgroup.com/en/worldwide/digital-identity-and-security/press_release/thales-technology-selected-new-schengen-entry

[14] https://www.airport-technology.com/news/thales-abc-gates/

[15] https://www.airport-technology.com/news/adani-airport-thales-partnership/

### Strengthening Trust through In-house Innovation and Adaptive Engagement

Thales builds brand equity by consistently delivering reliable, secure, and user-centric solutions that command trust from government authorities, airport operators, and end users. The company anchors its market reputation in its unique ability to develop all biometric technologies in-house, including facial, fingerprint, and iris recognition modules. This vertical integration ensures complete control over solution quality, accuracy, and security while providing tightly integrated, high-performance solutions that outperform fragmented, multi-vendor alternatives. Continuous upgrades to its document verification software and biometric modules, paired with a modular system architecture, strengthen Thales's reputation as an innovation-driven, customer-responsive partner.

Thales embeds customer-centric feedback loops into its operational model by systematically gathering real-world operational data and customer insights through on-site support teams stationed at key airport locations. These teams actively monitor system performance, engage with border agents, and capture traveler experiences, creating a continuous cycle of refinement and enhancement. This agile responsiveness to live operational feedback plays a pivotal role in sustaining high levels of client satisfaction and brand loyalty.

Another defining element of Thales's brand equity is its collaborative and adaptive engagement with government stakeholders. The company recognizes the unique policy frameworks, operational constraints, and infrastructure conditions of each client and tailors its solutions accordingly. Phased deployment strategies, customized configurations, and continuous stakeholder communication contribute to seamless implementations, encouraging long-term client relationships built on mutual trust.

Thales's dedication to passenger-centric design principles, prioritizing intuitive user interfaces and workflows accessible to travelers of all demographics, boosts public perception and traveler confidence in its systems. This thoughtful user experience design, reliable system uptime, and security performance support the brand's reputation as a dependable technology partner.

Internally, Thales aligns its global teams across regions and disciplines, ensuring that the client engagement benefits from shared best practices, operational intelligence, and technical expertise. Externally, the company maintains a dynamic global footprint and trusted local partnerships, enabling it to remain highly responsive to geopolitical shifts, evolving regulatory frameworks, and emerging security threats. Frost & Sullivan applauds Thales's approach to enhancing brand equity, combining strong in-house innovation, customer-centric design, and adaptive stakeholder engagement to lead in the global ABC eGates market.

## Conclusion

With rapidly evolving border control demands, Thales emerges as a technology leader that addresses the core security and efficiency challenges of modern border crossings, restructuring the global standard for automated border control through continuous innovation. The company combines advanced, artificial intelligence-driven biometrics, adaptable gate configurations, and seamless end-to-end journey enablement, delivering unmatched value across the identity management spectrum. Its modular design, regulatory foresight, and scalable architecture reflect best-in-class practices tailored to diverse geopolitical landscapes. With strong collaborations, practical customer support, and robust in-house research and development, Thales guarantees a high return on investment and long-term client trust. Ultimately, the company's strategic vision, operational excellence, and customer-centric approach solidify its position as a trailblazer in the global automated border control (ABC) electronic gate (eGate) market.

With its strong overall performance, Thales earns Frost & Sullivan's 2025 Global Company of the Year Recognition in the ABC eGates industry.

## What You Need to Know about the Company of the Year Recognition

Frost & Sullivan's Company of the Year Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

### Best Practices Recognition Analysis

For the Company of the Year Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

#### Visionary Innovation & Performance

**Addressing Unmet Needs**: Customers' unmet or under-served needs are unearthed and addressed to create growth opportunities across the entire value chain

**Visionary Scenarios Through Megatrends**: Long-range scenarios are incorporated into the innovation strategy by leveraging mega trends and cutting-edge technologies, thereby accelerating the transformational growth journey

**Leadership Focus**: The company focuses on building a leadership position in core markets to create stiff barriers to entry for new competitors and enhance its future growth potential

**Best Practices Implementation**: Best-in-class implementation is characterized by processes, tools, or activities that generate consistent, repeatable, and scalable success

**Financial Performance**: Strong overall business performance is achieved by striking the optimal balance between investing in revenue growth and maximizing operating margin

#### Customer Impact

**Price/Performance Value**: Products or services offer the best ROI and superior value compared to similar market offerings

**Customer Purchase Experience**: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

**Customer Ownership Excellence**: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

**Customer Service Experience**: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

**Brand Equity**: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

# Best Practices Recognition Analytics Methodology

## Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

**VALUE IMPACT**

| STEP | | WHAT | WHY |
|---|---|---|---|
| 1 | Opportunity Universe | Identify Sectors with the Greatest Impact on the Global Economy | Value to Economic Development |
| 2 | Transformational Model | Analyze Strategic Imperatives That Drive Transformation | Understand and Create a Winning Strategy |
| 3 | Ecosystem | Map Critical Value Chains | Comprehensive Community that Shapes the Sector |
| 4 | Growth Generator | Data Foundation That Provides Decision Support System | Spark Opportunities and Accelerate Decision-making |
| 5 | Growth Opportunities | Identify Opportunities Generated by Companies | Drive the Transformation of the Industry |
| 6 | Frost Radar | Benchmark Companies on Future Growth Potential | Identify Most Powerful Companies to Action |
| 7 | Best Practices | Identify Companies Achieving Best Practices in All Critical Perspectives | Inspire the World |
| 8 | Companies to Action | Tell Your Story to the World (BICEP*) | Ecosystem Community Supporting Future Success |

*Board of Directors, Investors, Customers, Employees, Partners

# About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at http://www.frost.com.

## The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

Learn more.

***Key Impacts***:

- **Growth Pipeline:** *Continuous Flow of Growth Opportunities*
- **Growth Strategies:** *Proven Best Practices*
- **Innovation Culture:** *Optimized Customer Experience*
- **ROI & Margin:** *Implementation Excellence*
- **Transformational Growth:** *Industry Leadership*

## The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

***Analytical Perspectives***:

- **Megatrend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**