Australian Government
Australian Trade and Investment Commission

Digital and Connected Health in Australia

Industry Capability Report

AUSTRALIA

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Executive summary

Health systems worldwide, including Australia, are facing several common challenges. These include an ageing population, a rise in chronic diseases, workforce shortages and burnout, increasing healthcare costs, unequal access to care, and greater recognition of mental health needs. As a result, health systems are under pressure to boost productivity, improve efficiency, and deliver better health outcomes.

Digital and connected health products and services are an essential part of the solution and Australian companies are leveraging cutting-edge technologies to transform healthcare delivery, improve access and increase productivity.

Australia's advanced digital health sector has the proven capability and readiness to deliver scalable, secure, and effective healthcare solutions for markets worldwide, underpinned by world-class innovation, strong government support, and robust standards for interoperability.

Health technologies are built in a world-class, complex health system - making them robust, adaptable, and globally relevant. Australia also offers a digitally skilled and globally connected health workforce, positioned to support international health businesses to deliver innovation, leadership, and operational excellence.

Australian digital health products and services have a proven track record of delivering digital health outcomes, including hospital management systems and health records, use of artificial in health solutions, improving access to care, streamlining clinical decision support and driving clinical workflow improvement.

This report showcases the compelling reasons why Australia is an ideal partner to pilot, scale, and co-develop advanced digital health solutions that deliver measurable real-world impact.

What is digital health?

Digital health is a fast-growing sector characterised by the use of digital technologies, either alone or in combination with physical products, to treat, diagnose, cure, mitigate and/or prevent disease or other conditions.

Australia aligns with the US Food and Drug Administration (FDA) definition of what digital health is – "The broad scope of digital health includes categories such as mobile health (mHealth), health information technology (IT), wearable devices, telehealth and telemedicine, and personalised medicine."[1]

This includes:

- Mobile health (mHealth)
- Health information technology (Health IT/ e-health)
- Connected and wearable devices
- Telehealth and telemedicine
- Personalised and precision medicine
- Digital medicines and digital therapeutics.

Australia's digital health market

Australia's digital and connected health sector is delivering scalable, secure and effective healthcare solutions to the world's most urgent health system challenges.

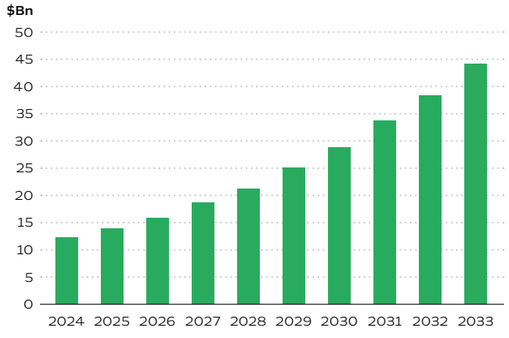
The Australian digital health market is worth **$12 billion**.[2]

Australia accounts for **12%** of the fast-growing Asia-Pacific digital health market.[3]

The sector has experienced remarkable expansion and increasing maturity over recent years. In 2024, the market was **valued at A$12 billion** and is forecast to **reach A$45 billion by 2033**, reflecting a robust **compound annual growth rate (CAGR) of 15.7%**.[2]

This strong trajectory underscores the sector's growing importance within the national economy and its rising profile in the broader Asia-Pacific region, where Australia accounted for **approximately 12% of the digital health market** in 2024.[3]

Australian digital health market forecast
Source: IMARC Group, 2024[2]



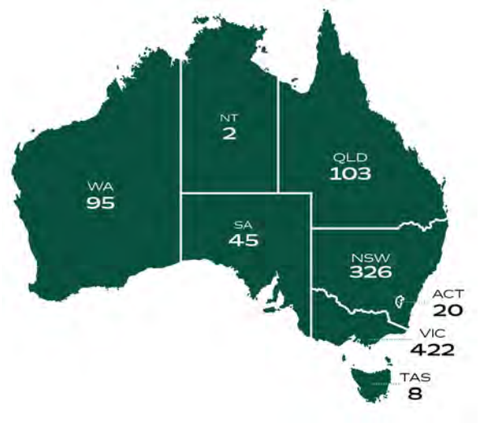
The ecosystem is characterised by a vibrant and rapidly expanding base of **more than 1,000 digital and connected health companies**. Since 2018, the number of these companies has **grown at a 59% CAGR**, reflecting both the dynamism of the sector and the increasing confidence of investors and innovators.

This growth is evident across all stages of the commercialisation pathway, from early-stage ideation through to full-scale implementation. This growth highlights Australia's sector maturity and its capacity to support innovation from concept to market.

Between 2020 and 2024, the proportion of start-ups that have reached proof-of-concept stage or beyond has **increased from 27% to 45%**.[2]

Digital health companies are spread across all states and territories throughout Australia. While key population hubs on the east coast are home to a higher share, growth in recent years has been spread across the country.

Australian digital health companies by state
Source: ANDHealth The Rising Giant 2025[4]



The continued growth of the sector is expected to further enhance Australia's leadership in digital health innovation. This progress is supported by a strong ecosystem that includes established and competitive health, business, government and academic sectors.

Regulation and governance

Australia's digital and connected health sector is built on a foundation of robust regulatory and governance frameworks that ensure high standards of safety, efficacy, and data protection.

Australian privacy, cyber and data security laws align with global standards, including General Data Protection Regulation (GDPR).

An internationally renowned medical research and clinical trial sector accelerates innovation.

The strong regulatory and governance systems underpin the quality and global competitiveness of its digital health sector. Australian digital health products must meet strict standards for safety, efficacy, and data protection, giving clinicians and consumers confidence in their use.

The Therapeutic Goods Administration (TGA) is responsible for ensuring therapeutic goods are safe and effective for use, including Software as a Medical Device (SaMD), using a risk-based approach that ensures products are clinically validated and safe.

Australia's regulatory frameworks are internationally recognised and focused on global harmonisation, leading to reduced barriers for Australian digital health solutions to scale and enter overseas markets. The TGA's guidelines are regularly updated to reflect international best practice, and Australia actively participates in global initiatives to promote interoperability and cross-border collaboration, including the International Medical Device Regulators Forum (IMDRF) and Global Digital Health Initiative (GDHI).

Data privacy and cybersecurity are also foundational to Australia's digital health governance. The *Privacy Act 1988*, together with state and territory legislation, sets out comprehensive requirements for the collection, management, and sharing of personal and health information.

Australian privacy and data security laws are closely aligned with global standards and require organisations to adopt transparent, privacy-by-design approaches to information handling. Australian companies customarily align their product and services development to internationally recognised standards for cybersecurity and privacy, including ISO standards.

These rigorous and globally aligned regulatory, privacy, data security and governance systems make Australia a compelling partner for collaboration, ensuring that Australian digital health products and services are trusted, interoperable, and ready for international markets.

A supportive ecosystem

Australia's digital and connected health sector exists within a highly supportive ecosystem, underpinned by a world-class health system and a globally recognised medical research environment.

The sector benefits from coordinated government strategy, significant public and private investment, and a strong focus on innovation and collaboration. Australia's **National Digital Health Strategy 2023–2028**, together with targeted funding and commercialisation programs, ensures that digital health companies are well positioned to develop, scale and deliver solutions that address major health challenges.

Australia is recognised as a trusted partner for health, with digital health innovations built in a world-class, complex health system, including the **#1 ranked health system globally** by the Commonwealth Fund[5] and fourth best life expectancy amongst OECD countries.[6]

The country boasts a dynamic tech scene, featuring a mix of leading global companies, established homegrown success stories, and a thriving startup sector. This diversity enables the rapid scaling of innovative solutions and supports the commercialisation of new technologies both domestically and internationally.

Central to this ecosystem is Australia's world-class university and research sector, which is globally recognised for excellence in medical research and clinical trials. Ranked **eighth in the world for medical research and clinical trials**[7] and ninth globally for health innovation.[8] Australia is also home to 25 of the top 400 universities worldwide.[9]

These elements drive innovation, attract international collaboration, and ensure that digital health solutions are underpinned by robust scientific evidence. This strong research foundation not only supports the development of cutting-edge technologies but also helps maintain Australia's reputation as a leader in digital health on the global stage.

With its integrated ecosystem of healthcare excellence, research leadership, and innovation support, Australia offers an ideal environment for partners seeking to collaborate, invest, or adopt world-leading digital health solutions.

#1
ranked global health system[5]

#4
ranked life expectancy in OECD countries[6]

#8
ranked global medical research and clinical trials[7]

#9
global health innovation ranking[8]

A world-best digital health framework

Australia's digital health sector is guided by a globally recognised framework and strategy that set the benchmark for excellence and innovation in connected health.

Australia digital and connected health products and services are created in an environment underpinned by a world-class digital health framework and robust national strategy. The **National Digital Health Strategy 2023–2028** has been **ranked number one globally**, praised for its comprehensive vision, clear objectives, and integrated approach to implementation.[10]

Developed in partnership with governments, healthcare providers, consumers, and industry, the strategy is supported by a detailed delivery roadmap that identifies priority actions, timelines, and responsible organisations, which ensure accountability and drives progress.

By fostering a collaborative, well-resourced, and strategically guided environment, Australia empowers its digital health companies to deliver world-leading solutions that improve access, quality, and outcomes for patients and health systems around the world.

The Australian Digital Health Blueprint provides certainty with a 10-year plan.

The National Digital Health Strategy emphasises inclusivity, including different cultures and languages.

Products and services are developed with a standardised interoperability system in place to help facilitate secure data sharing.

The Australian Government has invested more than **$2 billion in digital health infrastructure**[11] including $951.2 million announced in the 2022-23 Federal Budget.[12] This financial investment from Government ensures the sector has a solid foundation for growth and innovation. It also supports the development and deployment of advanced digital health solutions to patients and practitioners both domestically and in global markets.

Medical science and digital health have been identified as key priorities for government funding, including major initiatives such as the $24 billion Medical Research Future Fund[13] and the $15 billion National Reconstruction Fund.[14]

By fostering a well-resourced and strategically guided environment, Australia empowers its digital health companies to deliver world-leading solutions that improve access, quality, and outcomes for patients and health systems around the world.

This world-best digital health framework, backed by substantial investment and a clear strategic vision, makes Australia an ideal choice for health systems or governments looking to implement digital health solutions on a global scale.

A skilled and supported workforce

Australia's digital health sector is driven by a skilled and adaptable workforce who have a global mindset and diverse experience. This applies not only to those working developing technology but also training healthcare workers in the adoption of digital health technologies and providing specialised digital health commercialisation expertise.

Capability frameworks

Australia has national frameworks and action plans such as the National Digital Health Workforce[15] and Education Roadmap and the Digital Health Capability Action Plan[16] to ensure health professionals are equipped with the latest digital skills and leadership capabilities.

Diverse and qualified talent pool

The workforce includes experts in health informatics, information management, health IT, coders, developers, entrepreneurs and clinical practice.[17]

Continuous development

Ongoing education, postgraduate programs, micro-credentials, and industry partnerships ensure Australian professionals stay current with emerging technologies, data governance, cybersecurity, and digital transformation best practices.[17]

National capability frameworks and action plans, such as the National Digital Health Workforce[15] and Education Roadmap and the National Digital Health Capability Action Plan,[16] are designed to ensure health professionals are equipped with the latest digital skills and leadership capabilities.

The sector benefits from a diverse and qualified talent pool, encompassing experts in health informatics, information management, health IT, software development, entrepreneurship, and clinical practice.[17]

Ongoing education, postgraduate programs, micro-credentials, and strong industry partnerships further support continuous professional development. This education-driven ecosystem keeps Australian professionals at the forefront of emerging technologies, data governance, cybersecurity, and digital transformation best practices.[17]

Australia has developed a unique approach to commercialising digital health companies, characterised by dedicated expertise and substantial non-dilutive investment. The country's model supports the entire pipeline of digital and connected health businesses, guiding them from initial ideas through to full implementation.

Specialised commercialisation services with deep expertise in digital health, such as ANDHealth, MTPConnect, AusBiotech and Medical Technology Association of Australia help companies progress to maturity, ensuring they receive tailored support at every stage of their growth.

In addition, the Medical Research Future Fund's Medical Research Commercialisation Initiative has provided funding to incubator companies and associated programs such as ANDHealth+ and Brandon BioCatalyst's CUREator+.[18] This money is then distributed to early-stage Australian digital health companies in the form of non-dilutive investment, which enables innovators to scale and commercialise without giving up equity.

Australia's world-class talent, comprehensive professional development, and robust commercialisation support have built a highly skilled digital health workforce. This globally competitive workforce makes Australia a compelling partner for collaboration on and the delivery of cutting-edge digital health solutions.

CASE STUDY

Alcidion: improving patient flow

Alcidion is an Australian health informatics company that helps healthcare organisations harness the power of technology to create a clinically relevant environment with digitally enabled care.

Their tailored platforms leverage clinical decision support, artificial intelligence and real-time visualisation to provide smart health informatics for safer delivery of care.

Alcidion's **Miya Precision** solution improves patient flow management by integrating with existing systems to provide unified, real-time visibility across the hospital environment. An independent study showed the platform reduced patient outliers at admission by 17.7%, decreased length of stay by 12.1% and improved estimated discharge date compliance from 61% to 100% of patients.

Alcidion has recently introduced generative AI-based solutions in collaboration with Google Cloud, such as Miya Scribe, an AI-powered scribe, and Miya Insight, a patient record summary application. These tools leverage Google's Gemini on Vertex AI to transcribe clinical dialogue, summarise patient records, and enhance coding accuracy, further streamlining documentation and clinical workflows.

Alcidion's Miya Precision solution
Source: Alcidion

CASE STUDY

AHI: remote digital health assessment

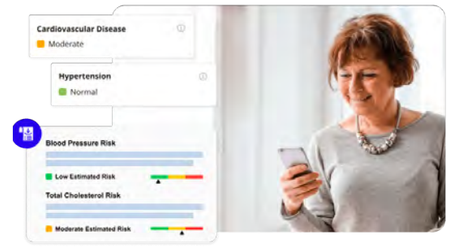
Advanced Health Intelligence (AHI) offers cutting-edge, smart-phone-based health risk identification solutions that enable individuals to run their own comprehensive health assessments and risk stratification.

Utilising smartphone sensor technology, individuals can efficiently conduct a single scan or a series of scans to identify risk markers for various health conditions like diabetes and cardiovascular disease. The resulting insights can then be shared with healthcare providers, insurers, employers, and government agencies, supporting proactive health management.

Over the past decade, AHI has been at the forefront of health-tech innovation, pioneering the use of smartphones in digital-first healthcare, starting with the groundbreaking development of the world's first on-device body dimensioning capability. Since then, it has continued to evolve and adapt its solutions to meet the dynamic needs of health systems players, who are dedicated to delivering high-quality patient care and early detection of escalating health conditions.

AHI's solutions are AI-powered but grounded in clinical knowledge, developed based on reviews of large population studies in diverse populations. Its algorithms passed through extensive testing to ensure that results generated were in line with those expected based on the literature.

These solutions can help to reduce barriers to health assessment, providing quicker, more convenient and reliable solutions to deliver comprehensive, in-depth health risk assessments. A Digital Health Check or Body Scan can be safely and securely conducted in less than two minutes, and a full Digital Health Assessment in just 15 minutes.



Advanced Health Intelligence's health assessment tool
Source: Advanced Health Intelligence

Insights on Australia's digital health offerings

As health systems worldwide grapple with similar issues, such as rising costs, workforce shortages, and the need for improved access and productivity, Australian companies are leveraging technology to deliver scalable, evidence-based solutions that can be deployed both domestically and internationally.

ANDHealth, Australia's peak digital health commercialisation company, publishes a bi-annual state of the state sector report. ***The Rising Giant***, the latest report published in 2025, provides some key insights on the sector and how it is addressing these global health challenges.[19]

A significant proportion of Australian digital health companies are focused on clinical decision support, which accounts for 19% of sector activity. These solutions harness advanced data analytics, artificial intelligence, and machine learning to assist clinicians in making more accurate and timely diagnoses, optimising treatment pathways, and reducing the risk of errors.

Self-management of disease is another major area, comprising 15% of the market, where digital platforms and mobile applications empower patients to monitor and manage chronic conditions such as diabetes, cardiovascular disease, and respiratory illnesses. This patient-centred approach not only improves individual health outcomes but also alleviates pressure on the broader health system by reducing unnecessary hospital visits and admissions.

The technologies underpinning these solutions are diverse and sophisticated. In line with rapid adoption and uptake in other sectors, Australian digital and connected health solutions have embraced the artificial intelligence boom, with **22% of all digital health products and services using AI as its primary technology**.

Australian digital health companies have demonstrated the successful translation of AI research into clinically validated products that improve patient outcomes, streamline workflows, and enable remote and personalised care. This is demonstrated in everything from radiology assessment, digital scribes, clinical decision support software and remote patient monitoring products.

Other prominent technologies include:

- telehealth
- wearable devices
- mobile health applications
- cloud-based data analytics, and;
- interoperable health IT systems including electronic medical records.

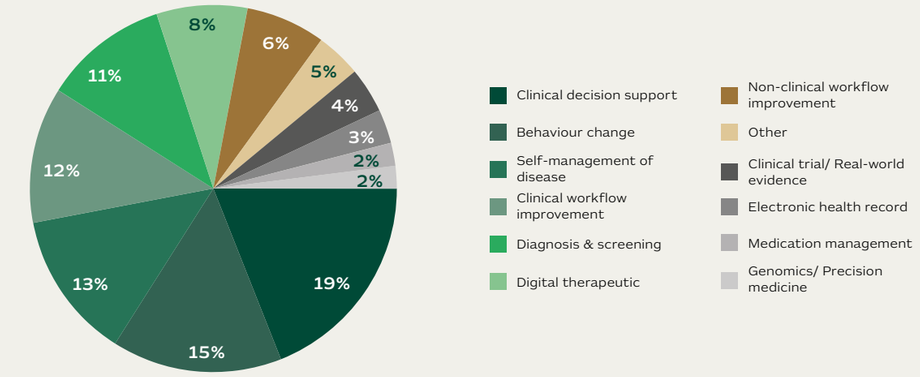
These digital tools not only improve the quality and efficiency of care delivery but empower patients to take a more active role in managing their health, regardless of their location or circumstances

Australia's digital health sector stands out for its breadth of expertise, rapid adoption of advanced technologies, and commitment to evidence-based, patient-centred solutions. With a proven track record in developing scalable, innovative products that address global health challenges, Australia is a trusted partner for collaboration.

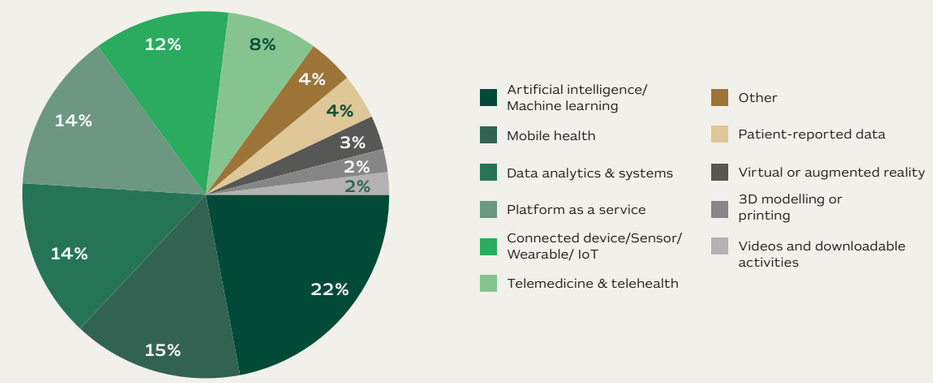
Health systems around the world can benefit from Australia's leadership in artificial intelligence, interoperability, and digital health innovation, ensuring access to solutions that are robust, adaptable, and ready to meet the needs of diverse populations worldwide.

With a proven track record in developing scalable, innovative products that address global health challenges, Australia is a trusted partner for collaboration.

Primary purpose of Australian digital health companies
Source: ANDHealth The Rising Giant 2025[19]



Primary technology used by Australian digital health companies
Source: ANDHealth The Rising Giant 2025[19]



Digital health infrastructure

Advanced digital health infrastructure underpins Australia's healthcare system, showcasing the nation's commitment to secure, interoperable, and patient-centred digital solutions.

Australia has built a sophisticated digital health infrastructure designed for seamless integration across the healthcare system. Central to this is the national electronic health record platform, My Health Record, which

- has over **24.3 million users**
- covers **99% of the population**
- contains more than **1.7 billion documents** uploaded by consumers and healthcare providers.[21]

The platform's widespread adoption ensures that health information is accessible and secure, supporting better continuity of care.

Alongside this, digital health services have seen significant uptake, with **219 million electronic prescriptions issued by more than 86,000 health practitioners** conducted between 2020 and 2024[22] and **132 million telehealth consultations**, highlighting the rapid shift towards digital-first healthcare delivery.[23]

A key enabler of this integration is Australia's adoption of a standardised interoperability framework using the FHIR (Fast Healthcare Interoperability Resources) standard. Led by the **Australian Digital Health Agency** in partnership with **HL7 Australia**, this initiative ensures real-time, secure, and standardised health data exchange across public and private health sectors.

Australia's world-class digital health infrastructure – characterised by near-universal electronic health record adoption, robust data security, and leadership in interoperability – provides a strong foundation for innovation and collaboration.

International partners can leverage Australia's proven digital platforms, expertise in large-scale health data integration, and commitment to global standards, making it an ideal environment for piloting, scaling, and co-developing advanced digital health solutions that deliver real-world impact.

24.3M
digital health records, covering 99% of the population[21]

1.7B
documents uploaded by patients or providers to My Health Record[21]

219M
electronic prescriptions issued since May 2020[22]

132M
telehealth consultations in Australia[23]

86,000
health practitioners issuing electronic prescriptions[22]

81%
of Australians use health websites or apps to manage common health conditions[24]

CASE STUDY

Connect2Live: advancing global healthcare connectivity

Founded in 2016 in Melbourne, **Neev Tech Labs** set out with a clear purpose: to bridge gaps in healthcare access using technology. Through its flagship platform, Connect2Live, and its modular ecosystem – Connect2MyDoctor, Connect2MyCarer, Connect2Move, and Connect2Community – the company delivers virtual care solutions across telehealth, remote monitoring, telerehabilitation, and assisted telemedicine.

With operations spanning Australia (HQ), India, and the UAE, Connect2Live combines global expertise with local presence. It remains Australia's only Dubai Health Authority (DHA)-approved telehealth platform, a testament to its commitment to quality and compliance.

Healthcare institutions across the Asia-Pacific and Middle East rely on Connect2Live's platform to extend their reach and improve patient outcomes. Notable partners include Aravind Eye Hospital, Centre for Chronic Disease Control (CCDC), Reem Hospital, Prime Hospital, and Jaslok Hospital.

What sets Connect2Live apart is its adaptability. Fully white-labelled and EHR-integrated, the platform is supported by a dedicated in-house team and built to scale – from specialty clinics to public health networks. With AI-powered tools and real-time data tracking, it helps providers deliver more personalized, timely care – especially in remote or underserved communities.

The demand for connected care continues to rise, driven by aging populations, chronic illness, and clinician shortages. Connect2Live is uniquely positioned to meet this demand with solutions that are intuitive, cost-effective, and designed for continuity of care.

By improving how patients, providers, and caregivers stay connected, Connect2Live helps health systems move from reactive treatment to proactive, coordinated care. As digital health continues to evolve, Connect2Live stands ready – not just to keep up, but to lead.

CASE STUDY

Eucalyptus: accessible, high-quality virtual care

Eucalyptus is a leading telehealth provider delivering accessible, evidence-based care for conditions often underserved in traditional healthcare, such as weight management, fertility, and men's health.

Operating digital clinics like Juniper (Women's health), Pilot (men's health), Kin (fertility and reproductive health), and Software (prescription skincare and teledermatology), Eucalyptus has provided over 1 million online consultations to nearly 600,000 patients globally.

They go beyond transactional telehealth by providing:

- One-on-one phone and text support
- Access to dietitians, health coaches, and a multidisciplinary care team
- Ongoing patient engagement and follow-up
- Rigorous clinical auditing and quality assurance.

Patients typically begin with an online questionnaire, followed by synchronous consultations with licensed practitioners. Prescriptions are fulfilled via partner pharmacies and delivered directly to patients. Eucalyptus also offers an online store for non-prescription product.

Eucalyptus's Juniper app
Source: Eucalyptus

The company is accredited by the Australian Council on Healthcare Standards and has achieved ISO-27001 and GDPR compliance, ensuring data security and clinical quality. Their digital-first approach has made healthcare more accessible, particularly for young people and those in remote areas.

Hospital management systems and health records

Australia's use of electronic health records (EHRs) is a cornerstone of its digital health transformation, with the national My Health Record system providing a secure, centralised digital summary of health information for over 24 million Australians.

In addition to the government implemented personal health record system, Australia has seen significant adoption of major EHR platforms within hospital systems, notably **Cerner** and **Epic**.

In New South Wales for example, the government has committed to implementing an Epic based EHR system as the foundation of their Single Digital Patient Record. This will be the largest single EHR implementation in the southern hemisphere and one of the largest globally.[25]

The project will unify EMR, pathology, and patient administration systems across 220 hospitals and serve eight million patients and is due to be completed by 2028.[26, 27]

Epic has proven successful in Australia, beginning with the Royal Children's Hospital in Melbourne in 2016 and subsequently expanding to the Parkville precinct and ACT Health, where it underpins statewide digital health records for hospitals, community health, and walk-in centres.

This reflects a broader national trend towards integrated, patient-centric digital health platforms that can support multidisciplinary care and data-driven decision-making. The move is expected to deliver significant benefits for both clinical staff and patients, including improved access to information, streamlined workflows, and enhanced capacity for innovation in care delivery.

The government's continued investment in EHR infrastructure and the adoption of global best practices position Australia as a leader in digital health, with ongoing efforts to address challenges such as interoperability, privacy, and the financial costs of large-scale system upgrades. Australian digital health solutions are continually being rolled out and trialled in the Australian health ecosystem before being shared with international partners.

Australia's ambitious, large-scale EHR implementations and commitment to integrated, patient-centric digital health platforms set a global benchmark for hospital management and health information systems.

With proven expertise in deploying and scaling advanced EHR solutions, ongoing investment in digital infrastructure, and a collaborative approach to innovation, Australia offers international partners a unique opportunity to access, co-develop, and adopt world-class digital health technologies that are rigorously tested and refined in a complex, high-performing health system.

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CASE STUDY

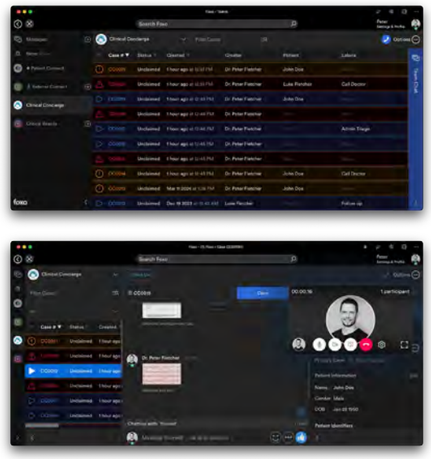
Foxo: transforming healthcare collaboration

Healthcare communication faces two key challenges: security and adoption. Systems are either locked behind apps and portals or remain unsecure, fragmented, and untracked. **Foxo**, an Australian healthtech company, set out to solve both.

Foxo is a cloud-based solution enabling secure, AI-powered communication with rich media across the care continuum. From hospitals to diagnostics, occupational health, clinical trials, and virtual care, Foxo integrates seamlessly with existing systems and is rapidly deployable across public and private healthcare.

At the core of Foxo's solution is **Powerlist**, a smart ticketing and collaboration layer that structures clinical workflows with real-time tracking, operational insights, and built-in AI case summarisation. Powerlist can receive inbound requests from external patients and providers and communicate out to anyone, anywhere in health. This transforms siloed systems into a truly connected environment across health systems and care settings, with the patient front and centre in the journey.

Unlike traditional systems, Foxo has reimagined access and does not require external providers or patients to download apps or access portals. This removes friction, accelerates adoption, and ensures inclusivity, all while maintaining strict security and privacy standards.



Foxo's Powerlist solution
Source: Foxo

CASE STUDY

Labflow: digitising laboratory workflows for seamless healthcare integration

Labflow enhances healthcare by automating and digitising pathology and diagnostic laboratory workflows, ensuring timely, accurate, and secure data exchange between labs, clinicians, and electronic health records.

With a mission to improve healthcare delivery through the digitisation of laboratory workflows, Labflow's solutions optimise every aspect of laboratory workflows, including pre-analytic, analytic, post-analytic, and lab operations.

Labflow provides a comprehensive suite of software solutions, including Laboratory Information Management Systems (LIMS), AI-powered reporting, and interoperability tools that connect lab data directly to electronic health records. This digital infrastructure reduces manual errors, improves turnaround times, and enables real-time sharing of pathology results with clinicians and patients.

Labflow's AI is already helping labs across Australia and Asia-Pacific streamline operations and surface new insights, including structuring unstructured data, reformatting for compliance, quality assurance and quality control and vision-based capture. Their solutions have been developed alongside laboratory professionals to enhance the systems and workflows they already rely on.

Labflow's suite of software solutions
Source: Labflow

CASE STUDY

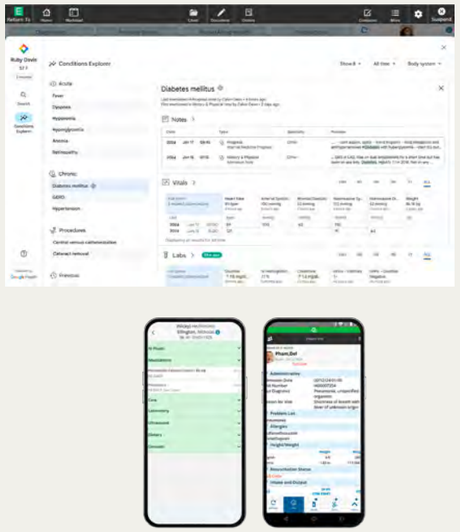
MEDITECH: empowering smarter, safer clinical decision-making

MEDITECH transforms healthcare delivery through its advanced electronic medical record (EMR) systems, integrating data analytics, AI, and cloud-based solutions to reduce clinician workload and enhance patient safety.

The company is committed to building an open, interoperable ecosystem that leverages data analytics, artificial intelligence (AI), and machine learning to enhance clinical decision-making and reduce the cognitive burden on clinicians.

MEDITECH's **Expanse** platform is a cloud-based, web and mobile solution designed to support care across all healthcare settings.
It offers intuitive navigation, real-time patient information, and is highly customisable to fit diverse workflows. Expanse enables clinicians to access records, review results, submit orders, and document care from any device.

By offering a cloud-based subscription model, MEDITECH gives organisations of all sizes access to the latest digital health tools, empowering them to provide high-quality care without the burden of high upfront costs.



MEDITECH's Expanse platform
Source: MEDITECH

CASE STUDY

Telstra Health: connecting care to improve lives

Telstra Health is one of Australia's largest and most trusted digital health businesses, built on a reputation for clinical safety, cybersecurity, and delivery credibility. It is powering a connected healthcare future through secure, safe and integrated software solutions spanning the continuum of health, aged, population health and social services.

As a leading provider of national digital health solutions, Telstra Health offers a robust suite of platforms and services designed to address health outcomes, enhance patient and provider experiences, and modernise healthcare infrastructure. These programs include the Australian Government's National Cancer Screening Register, National Electronic Script Exchange and Real Time Prescription Monitoring, and 1800RESPECT, the Australian Government's national domestic, family and sexual violence counselling, information and support service.

Telstra Health provides digital solutions for healthcare providers across primary, community, aged, pharmacy, hospital and virtual care settings. These solutions support customers with clinical, operational and financial systems, enhanced through ecosystem partnerships.

Telstra Health aims to create an intelligent and connected health ecosystem by providing health information exchange, interoperability and data platforms that support secure, consented and efficient data sharing to help surface intelligent and actionable insights.

Artificial intelligence in the Australian health system

Australia is experiencing rapid integration of artificial intelligence (AI) across its health system, with significant advancements in clinical documentation, decision support, and diagnostic services – particularly in radiology and pathology.

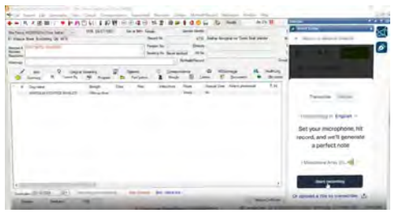
The federal government has invested approximately **A$30 million in AI research projects** to enhance access to health services, support early diagnosis, and improve personalised care. This includes high profile initiatives where Australia is leading the way including infrastructure for world's largest skin imaging database to diagnose melanoma[28] and a world-class AI-assisted youth mental healthcare.[29]

AI scribes and clinical documentation

AI scribes, or digital clinical assistants, are increasingly used by general practitioners (GPs) and specialists to automate clinical documentation. These tools capture conversations during consultations, transcribe them using advanced speech recognition and natural language processing, and generate structured clinical notes for review and inclusion in patient records.

Telstra Health's Smart Scribe solution, powered by **Heidi Health** and **Intellitek Health**, integrates with leading practice management system, **MedicalDirector**, offering live transcription, secure data handling, and significant time savings. Smart Scribe beta testing suggests an average of five minutes saved per consult, equating to up to AU$40,000 in annual savings per GP.

While AI scribes improve efficiency and accuracy, clinicians remain responsible for verifying the output, ensuring patient consent is obtained, and maintaining compliance with privacy regulations.



Telstra Health's Smart Scribe
Source: Telstra Health

Software as a Medical Device (SaMD)

Australia's health system has seen a rapid expansion in the use of Software as a Medical Device (SaMD), reflecting both technological innovation and a robust regulatory response.

SaMD refers to stand-alone software intended for medical purposes such as diagnosis, prevention, monitoring, or treatment of disease. Examples include mobile health apps, AI-driven diagnostic tools, and clinical decision support systems.

In Australia, SaMD is regulated by the Therapeutic Goods Administration (TGA) and must be included in the **Australian Register of Therapeutic Goods (ARTG)** before it can be legally supplied, unless it is specifically exempted or excluded.

The TGA's regulatory framework for SaMD is risk-based, with oversight levels determined by the potential impact on patient safety and the severity of the condition the software addresses. Recent reforms, effective from February 2021, have clarified classification rules, submission pathways, and post-market obligations for SaMD developers.

These reforms align with international standards, notably those of the **International Medical Device Regulators Forum (IMDRF)**, and require manufacturers to provide robust clinical evidence demonstrating that the software performs safely and effectively in real-world conditions.

Clinical evidence requirements for SaMD are stringent and include analytical validation, clinical association, and real-world clinical validation.
The TGA expects ongoing post-market surveillance and lifecycle management to ensure that software remains safe and effective as it is updated, or as new risks emerge.

Clinical Decision Support Software (CDSS)

Clinical decision support software is well established in Australian general practice and hospital settings, providing real-time, patient-specific information to enhance clinical decision-making. These systems offer alerts, reminders, recommendations, and risk assessments for diagnoses, medication safety, and preventive care.

The Therapeutic Goods Administration (TGA) regulates CDSS that meets the definition of a medical device, ensuring safety and efficacy, while also providing exemptions for certain lower-risk software.

For example, CDSS platforms such as **RippleDown** by **Beamtree** are used to analyse large volumes of test data, helping pathologists focus on complex or high-risk cases by surfacing relevant clinical insights and supporting personalised care pathways.

AI in diagnosis

AI-powered diagnostic systems are being trialled in Australian public hospitals to address workforce shortages and improve the speed and accuracy of radiology services. The first major public sector trial, led by Griffith University and Gold Coast Hospital and Health Service, is evaluating the impact of AI on workflow, workforce wellbeing, and clinical effectiveness.[31]

AI in medical imaging assists radiologists by rapidly analysing images, identifying anomalies, and prioritising urgent cases, which is particularly valuable when facing a shortage of radiologists.

Harrison.ai leverages artificial intelligence to enhance medical imaging diagnosis by providing comprehensive, clinician-friendly decision support tools that analyse chest X-rays and head CT scans. Its flagship solutions can detect up to 124 findings on chest X-rays and 130 findings on non-contrast head CT studies in under a minute, far surpassing the capabilities of most other AI products in terms of breadth and speed.[32]

These tools act as a “second set of digital eyes,” supporting radiologists by flagging possible findings, prioritising critical cases for rapid review, and reducing the risk of missed or delayed diagnoses.

CASE STUDY

Harrison.ai: smarter radiology

Harrison.ai is an Australian health technology company that develops advanced artificial intelligence solutions for medical imaging, with regulatory clearance in 40 countries.

Their comprehensive AI-powered products help clinicians rapidly and accurately interpret chest X-rays and head CT scans, enabling faster diagnoses, prioritisation of critical cases, and improved patient outcomes across healthcare systems worldwide.

The **Harrison.ai chest X-ray solution** detects up to 124 findings on chest x-rays and the **Harrison.ai Brain CT solution** detects up to 130 radiological findings on non-contrast head CT studies in under a minute.

Harrison’s AI models are trained on some of the world’s largest and most rigorously annotated medical imaging datasets, with input from over 150 qualified radiologists. The company’s products have received regulatory clearances in multiple regions and are robustly validated in real-world clinical settings.

Harrison.ai chest X-ray solution and Brain CT solution
Source: Harrison.AI

CASE STUDY

Optain: AI-powered retinal imaging

Optain provides non-invasive, AI-enabled retinal imaging tools that allow clinicians to screen for eye and systemic diseases rapidly and accurately, improving access to early detection and preventive care.

Optain’s mission is to transform preventive healthcare by using the eye as a gateway to monitor and assess overall patient health. Their technology enables clinicians to detect diseases in their earliest stages, shifting healthcare from reactive treatment to proactive prevention. The company aims to set new benchmarks in affordable, accessible, and rapid disease screening through AI-enabled tools

Their all-in-one solution combines a portable fundus camera with advanced AI algorithms to instantly analyse retinal images for early signs of conditions such as diabetic retinopathy, age-related macular degeneration, glaucoma, and cardiovascular risk. The technology is designed for easy integration into clinics, requiring minimal training and delivering immediate, evidence-based risk assessments, setting new benchmarks in affordable, accessible disease screening.

The standalone **Eyetelligence Assure** product is a software as a medical device (SaMD) offering that analyses retinal images to detect glaucoma, diabetic retinopathy (DR), age-related macular degeneration (AMD) and cardiovascular disease (CVD) risk. Optain accessed and analysed over a million images to develop their solution and deliver +90% accuracy rates.

Optain’s AI-enabled Software as a Medical Device (SaMD) and Portable Automatic Fundus Camera turnkey solution
Source: Optain

CASE STUDY

4DMedical: non-invasive lung analysis

4DMedical is a global medical technology company that has developed patented four-dimensional lung imaging technology, enabling non-invasive, real-time analysis of lung motion and airflow to provide clinicians with detailed, quantitative insights into regional lung function.

Their FDA-cleared solutions, support earlier and more accurate diagnosis and monitoring of respiratory diseases such as asthma, COPD, cystic fibrosis, and lung cancer.

The **XV Lung Ventilation Analysis Software (XV LVAS)** is an FDA-cleared software platform that uses existing hospital fluoroscopy to deliver more accurate and detailed information, with less impact to patients. XV LVAS gives clinicians a clearer, more complete picture of lung health.

4DMedical’s XV Lung Ventilation Analysis Software
Source: 4DMedical

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Our partners

This report has been prepared in collaboration with ANDHealth

ANDHealth is Australia’s leading organisation specialising in the commercialisation of evidence-based digital and connected health technologies. ANDHealth’s globally unique cooperative commercialisation model has led to significant growth within Australia’s nascent digital health sector and continues to be a driving force for the development of Australia’s capability in evidence-based, regulated digital health technologies.

ANDHealth is one of Australia’s leading health technology commercialisation organisations, ranking in the Australian Financial Review’s Top 10 Most Innovative Companies in Health in 2023. Companies participating in its flagship ANDHealth+ program raised $19.70 in new capital and generated $6.70 in new revenues for every dollar invested. ANDHealth manages over $33M in public and private commitments to digital health commercialisation and provides specialist support to a further $100M of funding managed by Brandon Capital.

ANDHealth is supported by the Australian Government Department of Health, Disability and Ageing Medical Research Future Fund. Its partner network represents a unique multi-sectoral, multidisciplinary group, which works collaboratively across ANDHealth’s operations to support and deliver its programs and services.

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