

CONFIDENCE AUSTRALIA CAN COUNT ON

Key findings from independent UTS Research into the
Economic and Social Value of NATA Accreditation

A NATA summary of independent Research conducted by
the University of Technology Sydney (UTS)

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About this publication

This publication summarises selected findings from the University of Technology Sydney (UTS) report ***Beyond Compliance: The Economic and Social Value of NATA Accreditation in Australia***. The research was commissioned by the National Association of Testing Authorities, Australia (NATA) and conducted by UTS. Refer to the full UTS report for the complete methodology, detailed analysis, assumptions and limitations.

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Foreword



“At a time when economies are becoming more complex and interconnected, trusted systems matter more than ever.”

Accreditation is one of those systems.”

Jennifer Evans

CEO, National Association of Testing Authorities (NATA)

Every day, Australians place their trust in systems they rarely see.

They rely on pathology results, on drinking water testing, infrastructure inspections, forensic evidence, environmental monitoring and product testing to guide decisions. They rely on Australian goods and services being recognised by customers and regulators at home and overseas. Behind these everyday decisions, there is an often unseen but essential part of Australia’s national infrastructure: accreditation.

For nearly 80 years, NATA accreditation has helped build confidence Australia can count on. It recognises the technical competence of organisations, providing reliability and confidence in their services through internationally recognised accreditation.

This report presents independent research conducted by the University of Technology Sydney (UTS) that examines the economic and societal value of accreditation in Australia.

The findings estimate that NATA accreditation contributes between AUD \$488 million and AUD \$712 million to the Australian economy each year. They also demonstrate broader value through confidence, competence, quality, reliability, risk reduction, local and international market access and trust in technical information.

At a time when economies are becoming more complex and interconnected, trusted systems matter more than ever.

Accreditation is one of those systems.



Preface



“Modern economies rely on trust.”

“Accreditation contributes to this trust by providing independent assurance of competence and capability.”

Emeritus Professor Roy Green

University of Technology Sydney

Modern economies rely on trust.

Trust allows consumers to make informed decisions, businesses to compete fairly, regulators to operate effectively, and governments to maintain confidence in critical systems.

Accreditation contributes to this trust by providing independent assurance of competence and capability.

This study updates the earlier assessment of accreditation’s value undertaken by the University of Technology Sydney for NATA. The findings identify measurable economic benefits. They also identify broader social and intangible value, including trust, capability, quality systems, public safety, regulatory competence and confidence in technical information. That confidence supports better decisions, stronger institutions, safer communities and more competitive industries.

NATA accreditation provides both direct and indirect benefits to consumers, businesses, regulators and governments, and in doing so contributes to Australia’s economic and social wellbeing. The results suggest that accreditation should not be viewed simply as a technical requirement, it is also an important component of Australia’s technical infrastructure and a contributor to economic and social value.





Executive Summary

The University of Technology Sydney (UTS) research estimates that NATA accreditation contributes between AUD \$488 million and AUD \$712 million to Australia's economy each year.

The independent research by UTS finds that NATA accreditation delivers measurable economic value and also broader social value across Australia.

The report, titled *"Beyond Compliance: The Economic and Social Value of NATA Accreditation in Australia"*, estimates that accreditation contributes between AUD \$488 million and AUD \$712 million annually to the Australian economy, with growth broadly aligned with national economic growth since the landmark 2018 study.

The economic estimate is only part of the story. The report also finds that NATA accreditation supports confidence in the technical results and services that underpin decisions across Australia's economy and society.

Accreditation builds trust and confidence

The report also notes that accreditation supports testing, measurement, inspection, calibration and related technical services that are essential to health, safety, trade, regulation, innovation, environmental protection and legal defensibility.

In addition, the report identifies economic value through price effects, efficiency and productivity gains, innovation and market access. It also identifies broader social and intangible value through trust, technical capability, regulatory confidence and risk reduction.

In an environment characterised by uncertainty, disruption and increasing complexity, trusted systems are a strategic national asset.

The Invisible Infrastructure Of Trust



Australians rely on accredited services every day, often without seeing the systems behind them:

For example:

- When pathology results inform clinical decisions;
- When drinking water and environmental samples are tested;
- When infrastructure, equipment or materials are inspected;
- When forensic evidence is scrutinised; and
- When products and services are accepted in domestic and international markets.

Each of these activities depends on confidence that the outcomes of testing, inspection and measurement are accurate, reliable and meet international standards.

Like roads, ports and communications networks, accreditation forms part of the infrastructure that enables economic activity. The difference is that its contribution is largely invisible.

The UTS study shows that NATA accreditation serves as a foundation for confidence, supporting organisations, industries, regulators and the broader economy.



Key Findings From The UTS Report

1. NATA Accreditation Creates Measurable Economic Value

One of the study's most significant findings is the estimated economic contribution of NATA accreditation.

**AUD \$488M to
AUD \$712M**

The 2026 report estimates total annual economic value at AUD \$488M to AUD \$712M.

This is an increase from the previous 2018 UTS study, which estimated the economic value of NATA accreditation to be between AUD \$315M to AUD \$421M.

This increase reflects the continuing importance of NATA accredited conformity assessment services across Australia's industry and economy. After adjusting for inflation, the UTS report finds the estimated real economic value has grown broadly in line with the long-run growth trajectory of the Australian economy.

2. Importance of Accreditation

**87% of respondents
rated accreditation
as highly important
to their business**

NATA accreditation is highly important to business operations, with 87% of respondents rating it as such and only 3% seeing it as of limited importance.

The main reasons organisations pursue accreditation are meeting customer expectations and regulatory requirements (both 59%), followed by improving brand confidence (54%).

Overall, accreditation delivers value through trust, compliance, efficiency and market positioning. While direct financial impacts may vary, its broader contribution to confidence, quality and market function is significant, reinforcing its role as a core part of market infrastructure.



3. Brand Reliability and Trust

Accreditation strengthens brand confidence, credibility and trust by signalling quality and reliability.

**Strengthens
organisation's brand
67% large, 54%
medium, 59% small**

It helps organisations demonstrate competence to clients and stakeholders and is seen as important for strengthening brand trust across large (67%), medium (54%) and small (59%) organisations.

By reducing information gaps in technical markets, accreditation also supports trust-based transactions and stronger customer relationships.

4. Dual Role: Compliance and Strategic Differentiation

NATA accreditation plays both a compliance and strategic role. In regulated sectors, it is often a requirement to participate. In competitive sectors, it can differentiate organisations by strengthening market position and client confidence.

For example, in Life Sciences, 68% of respondents saw accreditation as important to business outcomes. In Calibration and Inspection, accreditation was more often viewed as a baseline requirement that levels competition (53% and 48%, respectively).

5. Pricing Power

NATA accreditation supports price premiums, particularly where quality assurance is critical. In Calibration and Testing, many respondents reported being able to charge premiums of more than 12% for accredited services.

While broader price rises are mainly driven by factors such as the Consumer Price Index (CPI) and labour costs, accreditation contributes to pricing power by increasing trust and perceived quality.

The price premium component is estimated to contribute AUD \$140 million to \$192 million in economic value.

When both the price premium and broader price increase effects are included, the overall price channel is estimated at approximately AUD \$155 million to \$213 million.

6. Market Entry and Trade Opportunities

**26% of respondents
report access to
new domestic
and international
markets**

Accreditation helps organisations enter new markets and participate in higher-value activities. 26% of respondents said it enabled entry into new domestic or international markets.

In many cases, accreditation is a prerequisite for access to regulated or international markets rather than simply a competitive advantage. This supports participation in global supply chains and is estimated to generate AUD \$114 million to \$182 million in economic value.

7. Social and Public Value

NATA accreditation provides a broader public assurance function that is often unseen by end users.

Technical assessors are drawn from the sectors NATA offers accreditation, including Human Pathology (40.3%), Infrastructure and Asset Integrity (12.2%), Inspection (11.0%), Environment (8.8%) and Food and Beverage (6.6%).

Accreditation supports community safety by reducing the risk of errors and failures, for example, in products and non-compliance with applicable standards.



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Accreditation supports community safety by reducing the risk of errors and failures, for example, in products and non-compliance with applicable standards.

88.1% see accreditation as supporting continuous improvement

In the Technical Assessor survey, 76.2% rated risk reduction as a significant or exceptional value area, and 91.2% said the same for regulatory compliance. Trust is a direct outcome of accreditation. 83.1% of respondents rated industry confidence as significant or exceptional, and 88.1% said the same for continuous improvement.

8. Driving Innovation

Accreditation contributes to innovation-related revenue, with many organisations reporting impacts of up to 4% of total revenue, and some reporting impacts above 8%. The strongest effects were seen in process, organisational and market-related innovation.

The Calibration sector showed the strongest impacts, particularly in process innovation (24%) and marketing innovation (18%), followed by organisational innovation (12%) and product innovation (9%).

Accreditation also supports organisational efficiency, with the Calibration sector showing the highest positive contribution in this area (50%).

Overall, innovation-related economic contributions are estimated at AUD \$93 million to \$140 million.

The full UTS report also notes that a smaller proportion of respondents reported limited or negative innovation effects, often linked to administrative burden, validation requirements or compliance-related friction.

9. Efficiency Gains

Improvements in management systems and processes were the second most frequently reported organisational impact, contributing to stronger operational performance.

NATA accreditation reduces the likelihood of failures and rework and even possibly disputes (hence costs avoided). These gains support both cost savings and productivity improvements.

"NATA accreditation reduces the likelihood of failures and rework and even possibly disputes (hence costs avoided)."

Efficiency gains from cost and time savings are estimated to contribute AUD \$68 million to AUD \$97 million in economic value, excluding the separately reported cost-avoided component.

In summary, the various value channels of NATA accreditation are presented in Table 1.

Although the estimate is conservative and excludes many harder-to-measure benefits such as trust, quality assurance and risk reduction, it provides a lower-bound measure of NATA's total economic value.



Table 1: Aggregate economic value of NATA accreditation

Contribution	Calibration	Testing	Inspection	Total by Activity
Price Premium	\$3.39m – \$4.53m	\$134.55m – \$183.94m	\$2.67m – \$3.55m	\$140.61m – \$192.02m
Price Increase	\$0.70m – \$0.93m	\$13.76m – \$19.66m	\$0.47m – \$0.67m	\$14.93m – \$21.26m
Efficiency (cost & time savings only)	\$3.62m – \$4.93m	\$63.06m – \$90.09m	\$1.72m – \$2.44m	\$68.40m – \$97.46m
Innovation	\$5.23m – \$6.97m	\$86.0m – \$130.30m	\$1.75m – \$2.49m	\$92.98m – \$139.76m
Subtotal	\$12.94m – \$17.36m	\$297.37m – \$423.99m	\$6.61m – \$9.15m	\$316.92m – \$450.50m

	Additional System-Wide Contributions
Price Premium	\$39.99m – \$62.44m
Market Access	\$114.33m – \$182.20m
Assessment workforce	\$17.18m
Total	\$488.42m – \$712.32m

So, accreditation can be seen not simply as a cost of doing business, but as an enabler of economic activity.



Accreditation Creates Value



Roads move goods, ports connect markets, telecommunications networks connect people, and accreditation connects confidence.

Accreditation provides independent assurance that organisations maintain the technical competence and organisational capability required to produce reliable outcomes.

The UTS report shows that value is created at several levels.

1. For Organisations

Improving quality management systems, consistency, efficiency, customer confidence and market access.

2. For Industries

Supporting common expectations, comparability, technical confidence and compliance with recognised standards.

3. For Australia

Strengthening trade, regulatory assurance, public safety, innovation and confidence in technical information.

Unlike other forms of infrastructure, accreditation often operates unseen.

Its value becomes most apparent when confidence is absent.

NATA is a key part of Australia's quality infrastructure, which operates as a coordinated system of national institutions, collectively referred to as the Australian Technical Infrastructure Alliance (ATIA). This system comprises Standards Australia, the National Measurement Institute (NMI), National Association of Testing Authorities, Australia, and the Joint Accreditation System of Australia and New Zealand (JASANZ), each playing a distinct but complementary role across standardisation, measurement science, accreditation, and conformity assessment.

What Happens Without Accreditation?



The UTS Report also considered a counterfactual perspective: what may be at risk in the absence of a trusted accreditation framework?

This is not presented as a second economic estimate. It is a system-level lens used to illustrate the broader role accreditation plays in reducing uncertainty, supporting market access and protecting confidence across the economy.

The report suggests that, without trusted accreditation, Australia could face:

- Reduced confidence in testing, inspection, calibration and related technical outcomes
- Increased duplication and compliance costs
- Greater uncertainty between buyers and sellers or technical services
- Weaker confidence in regulatory systems
- Increased barriers to trade
- Reduced consistency across technical markets
- Greater exposure to system-level risk

In short, accreditation reduces uncertainty. And reducing uncertainty creates value and builds trust.



How The Research Was Conducted

Understanding the value of accreditation requires more than financial analysis.

To examine NATA's contribution to Australia, UTS researchers used a mixed-methods research design that combined economic modelling, surveys, interviews, case studies and literature review.

The research combined*:

- **Economic modelling** to estimate measurable value across key channels
- **An organisational survey**, which had 165 respondents, and a NATA Technical Assessor survey which had 181 respondents
- **Structured interviews and case studies** to understand how accreditation creates value in practice
- **A counterfactual perspective** to consider what may be at risk in the absence of a trusted accreditation infrastructure

This blended approach allowed UTS to examine both measurable economic impacts and broader social and intangible benefits that are more difficult to quantify.

The research was conducted in late 2025 and early 2026.

**The full UTS report provides the detailed methodology, response rates, assumptions and limitations.*



Trust In Action (Case Studies)



Economic modelling and survey analysis formed part of the quantitative foundation of the UTS research. To complement these findings, researchers conducted interviews with NATA Member organisations operating across healthcare, forensic science, environmental testing, infrastructure and proficiency testing.

These interviews provided practical insights into how accreditation creates value in real-world settings, revealing impacts that extend beyond measurable economic outcomes to include public safety, patient care, organisational performance, international trade and community confidence.

The following case studies demonstrate how accreditation supports trusted outcomes across sectors that Australians rely on every day.

NSW Health Pathology

Confidence in Every Diagnosis

Every day, thousands of healthcare decisions rely on pathology results. For clinicians, patients and healthcare providers, confidence in those results is essential.

NSW Health Pathology highlighted the role accreditation plays in maintaining quality, consistency and technical competence across a complex network of laboratories. Accreditation is seen to provide independent assurance that testing processes meet recognised standards and support a culture of continuous improvement.

Beyond compliance, accreditation helps strengthen confidence in the evidence used to diagnose, treat and monitor patients.

As the Chief Pathologist and Local Pathology Director told UTS, accreditation is: ***“a good benchmarking exercise”*** and ***“a good audit process”*** that ***“gives me confidence in my organisation, and it gives the people we provide the service to confidence as well”***.

The report also notes the expectation that ***“when you have your blood test, [you would expect] the results to be reliable”***, with NATA accreditation described as ***“a very important component of that”***.

Why it matters: Trust in healthcare begins with trust in the information that informs clinical decisions.

Agrifood Technology

Confidence Across the Food Supply Chain

Food safety, quality and export confidence depend on reliable analytical results. For Agrifood Technology, NATA accreditation provides the independent assurance needed to operate in a tightly regulated and highly competitive food testing market.

Agrifood Technology highlighted the role accreditation plays in maintaining technical competence, method reliability and confidence in results across agribusiness and processed food testing. With more than 34 years of continuous accreditation and approximately 60% of its services accredited, the organisation sees accreditation as central to meeting customer expectations, regulatory requirements and internal quality objectives.

Beyond compliance, accreditation supports Agrifood's ability to win tenders, maintain key revenue streams, strengthen its brand and support exporters whose products rely on internationally accepted certificates of analysis.

As Agrifood's General Manager told UTS, NATA accreditation is effectively ***“a licence for us to do business”***, with many customers treating accredited testing as a mandatory requirement. The report also notes that accreditation helps ensure staff do not simply ***“put out a number”***, but verify that it is ***“the right result and it's accurate”***.

Why it matters: Trust in food supply chains begins with confidence in the testing that confirms safety, quality and market readiness.



Victoria Police Forensic Services

Confidence in the Justice System

The justice system depends on evidence that can withstand scrutiny.

Victoria Police Forensic Services identified accreditation as an important mechanism for demonstrating competence and maintaining confidence in forensic processes.

Accreditation provides assurance that methods, systems and procedures meet internationally recognised standards.

This confidence extends beyond the laboratory, supporting investigators, courts and the broader community.

In a field where outcomes can have life-changing consequences, accreditation helps ensure decisions are supported by trusted evidence.

Victoria Police told UTS that accreditation confirms its systems are **“rigorous and robust”**, supporting confidence among courts and investigators.

In courtroom settings, accreditation assists staff to **“stand by the results”** because the processes have gone through the rigorous process of NATA assessments.

Why it matters: Confidence in forensic science contributes directly to confidence in justice.

ALS Water

Protecting Communities Through Reliable Testing

Safe drinking water depends on accurate testing and trusted data.

ALS Water highlighted the role accreditation plays in delivering confidence in environmental testing and analytical results. Accreditation provides assurance that testing methods, personnel and management systems meet recognised standards, helping support public health and environmental protection.

For governments, utilities and communities, reliable testing enables informed decision-making and effective risk management.

The UTS report notes that ALS Water has maintained NATA accreditation for more than 50 years across chemistry and biological testing, and that many clients require NATA-accredited services to meet obligations under the Safe Drinking Water Act and other regulatory frameworks.

The report also notes that ALS views audits as collaborative quality improvement processes rather than compliance exercises.

Why it matters: Trusted data helps protect both people and the environment.



Bullivants

Building Confidence in Critical Infrastructure

From construction projects to industrial assets, safety depends on confidence in inspection outcomes.

Bullivants highlighted accreditation's role in demonstrating technical competence and ensuring consistency in inspection services. Accreditation provides customers with assurance that inspections are performed using recognised methodologies and robust management systems.

In sectors where safety and reliability are paramount, accreditation supports confidence in the performance and integrity of critical infrastructure.

The UTS report notes that Bullivants has maintained NATA accreditation for more than 60 years and that major clients require accreditation to support testing, inspection and safety-critical work.

Bullivants told UTS that for major corporations, **"the reputation of NATA"** is seen as critical.

Why it matters: Infrastructure is only as strong as the confidence placed in its safety and performance.

The Royal College of Pathologists of Australasia Quality Assurance Programs (RCPAQAP)

Trust Beyond Borders

RCPAQAP supports pathology laboratories across Australia through accredited proficiency testing programs that help diagnostic testing remain accurate, reliable and consistent.

Accreditation has been central to its operations for almost 40 years, providing internationally recognised assurance of technical competence and quality. For many international customers, accreditation is a key requirement when selecting a quality assurance provider.

By strengthening confidence in laboratory performance, accreditation supports better patient outcomes while helping Australian expertise compete globally.

RCPAQAP told UTS that international clients often first ask to see accreditation certificates.

Why it matters: Trust in accreditation helps confidence travel across borders.

Western Australia Country Health Service

Delivering Confidence Across Distance

Across a large and geographically dispersed healthcare system, the Western Australia Country Health Service provides diagnostic imaging services to regional and remote communities.

Accreditation helps ensure patients receive consistent, high-quality services regardless of location.

Through independent assessment, accreditation supports clinical governance, quality assurance and patient safety across a geographically dispersed network.

For WACHS, accreditation provides confidence that healthcare services delivered in remote communities meet the same standards expected anywhere in Australia.

Why it matters: Quality healthcare should not depend on geography.



The Value Of Expertise



One of the unique features of NATA's accreditation system is the contribution made by NATA's volunteer Technical Assessors.

The UTS report describes Technical Assessors and Lead Assessors as the "human infrastructure" of the accreditation framework.

The report estimates the assessment workforce channel at approximately AUD \$17.18 million, while noting that the broader value of peer review, technical judgement and knowledge exchange extends beyond what can be captured in monetary terms.

The research highlights the volunteer significant value these experts provide through peer assessment, technical knowledge exchange and industry insight. NATA's volunteer Technical Assessors who generously provide their time and technical expertise to NATA help maintain the integrity, credibility and consistency of accreditation outcomes across the country.

The Technical Assessor survey also found accreditation contributes to continuous improvement of management systems, specifically internal audit processes, and increased investment in staff development.

Their contribution strengthens both individual organisations and the broader conformity assessment ecosystem.

Looking Forward



Australia's future prosperity will increasingly depend on trusted systems.

Emerging technologies, advanced manufacturing, clean energy, digital transformation and global supply chains all require confidence in testing, inspection, calibration and related activities. As industries evolve, accreditation will continue to play a critical role in promoting innovation while maintaining trust.

"As industries evolve, accreditation will continue to play a critical role in promoting innovation while maintaining trust."

The findings of this report demonstrate that accreditation is not merely a technical process. It also clearly identifies confidence in its economic and social infrastructure value.



A Strategic Asset For Australia

The value of NATA accreditation extends well beyond compliance.

- ✓ It strengthens confidence in markets.
- ✓ It supports effective regulation.
- ✓ It enables domestic and international market access.
- ✓ It supports innovation and capability.
- ✓ It improves quality, efficiency, and productivity.
- ✓ It helps reduce risk and supports public safety.

As Australia navigates economic uncertainty, technological transformation and increasingly complex global markets, trusted technical infrastructure will become even more important.

Accreditation is part of that infrastructure.

It is a national asset that supports reliability, competitiveness and growth.

It helps ensure Australian products, services and expertise are recognised and trusted in domestic and international markets.

Most importantly, it helps create confidence.

And confidence is one of the foundations upon which prosperous economies are built.

"For nearly 80 years, NATA accreditation has helped build confidence Australia can count on."

Jennifer Evans
NATA, CEO

