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AI in Healthcare

Reimagine care with AI-driven transformation

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FICCI HEAL 2025
HEALTH + ENTERPRISE + LEARNING

Foreword by FICCI

India's healthcare sector is at a defining moment, where the convergence of technology and public health priorities is creating new pathways for transformation. As digital health adoption accelerates across public health programs and facilities, Artificial Intelligence (AI) is emerging as a powerful enabler—offering the potential to shift from reactive care models to proactive, data-driven public health strategies.

The increasing complexity of healthcare demands innovative solutions that can address systemic challenges such as fragmented data systems, limited interoperability, and workforce constraints. AI has the potential to bridge these gaps by enhancing disease surveillance, optimising resource allocation, and enabling targeted interventions for non-communicable diseases, maternal and child health, and more. It also strengthens citizen engagement through AI-powered platforms and chatbots and supports transparency in public health schemes through advanced fraud detection and monitoring.

However, successful AI adoption in public health requires a deliberate and inclusive approach. Challenges such as legacy system integration, data privacy, ethical governance, and workforce readiness must be addressed to ensure sustainable impact. It is equally important to align AI initiatives with national health priorities and the pursuit of measurable clinical outcomes, supported by long-term capacity building through partnerships across government, academia, and the private sector.

Federation of Indian Chambers of Commerce and Industry (FICCI) has consistently championed the integration of technology into healthcare delivery, advocating for scalable, equitable, and future-ready solutions. This FICCI–KPMG in India knowledge paper, 'AI in Healthcare: Reimagine care with AI-driven transformation,' explores the transformative role of AI not only in public health but also across the broader healthcare value chain. From self-care and patient engagement to hospital operations, clinical workflows, claims management, and population health programs, the paper highlights key use cases, implementation challenges, and strategic recommendations for stakeholders across the ecosystem.

We hope this paper, released during the 19th edition of FICCI's annual healthcare conference – FICCI HEAL 2025, with the central theme "Care@25: Defining Moments in Healthcare", serves as a catalyst for meaningful dialogue and action, guiding India's public health systems toward a more inclusive, intelligent, and resilient future. By harnessing the power of artificial intelligence in public health, we can reimagine India's healthcare landscape—where data-driven insights strengthen trust, proactive and equitable care becomes the norm, and technology-enabled value-based outcomes lay the foundation for a more resilient and inclusive system.

As we turn the page to this next chapter, let us do so with a shared purpose. The future of healthcare in India depends not just on innovation, but on integration—of data systems, ethical safeguards, and a collective commitment to leveraging AI for equitable, accountable, and future-ready public health.



Dr Harsh Mahajan
Chair, FICCI Health Services Committee and Founder & Chairman, Mahajan Imaging & Labs



Mr Varun Khanna
Co-Chair, FICCI Health Services Committee and Group MD, Quality Care India Limited (Care, KIMS & Evercare)



Dr Anupam Sibal
Co-Chair, FICCI Health Services Committee and Group Medical Director, Apollo Hospitals Group

Foreword by KPMG in India

The healthcare sector is undergoing a profound transformation, driven by the convergence of technology, data, and evolving patient expectations. In this dynamic landscape, Artificial Intelligence (AI) is emerging as a powerful enabler—reshaping how care is delivered, accessed, and experienced. From diagnostics and treatment planning to operational efficiency and workforce support, AI is beginning to address some of the sector's most persistent challenges.

India's healthcare ecosystem is vast and multifaceted, encompassing providers, pharmaceuticals, medical devices, and insurance—all of which play a critical role in shaping the future of care. As the sector grapples with rising demand, workforce shortages, and growing clinical backlogs, the need for scalable, intelligent solutions has never been more urgent. AI offers the potential to bridge these gaps, but its adoption must be strategic, inclusive, and aligned with core healthcare value streams.

This KPMG in India – FICCI paper is the result of extensive research into the value being created by AI across the healthcare continuum. It explores how organisations are deploying AI—from early pilots to enterprise-wide initiatives—and the barriers that continue to impede scale, including fragmented implementations, data silos, and the need for cultural transformation. It also highlights the importance of clinician engagement, ethical governance, and robust infrastructure in building trust and driving sustainable impact.

As we navigate this era of digital health, it is imperative to recognise that technology alone cannot transform healthcare. A clear strategy, supported by interoperable systems, transparent practices, and a culture of innovation, is essential to unlock AI's full potential. This publication aims to provide healthcare leaders, policymakers, and educators with actionable insights to guide their AI journey—ultimately enabling better outcomes for patients, providers, and communities.

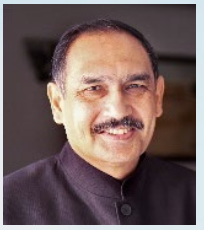


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Partner and Co-head,
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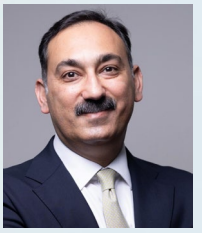
Industry voices

Artificial Intelligence (AI) is poised to revolutionise radiology and medical imaging by enhancing the speed, quality, and accuracy of both image acquisition and interpretation. Today, most advanced CT, MRI, PET-CT, and ultrasound systems incorporate AI-based image reconstruction techniques that not only reduce radiation dose in CT and PET-CT but also accelerate scan times and improve patient comfort during MRI examinations. With over 1,000 USFDA-approved AI algorithms already available—and many more under development—AI is rapidly becoming an indispensable assistant to the radiologist, augmenting human expertise. These tools help increase productivity, shorten turnaround times, and minimize errors or missed findings, thereby democratizing access to high-quality radiology while simultaneously reducing healthcare costs. Our approach has always emphasized the importance of a platform-based model for validation and deployment of AI solutions in hospitals and diagnostic centers. India's own CARPL.ai exemplifies this vision—it is the only USFDA- and CE-certified AI platform in radiology, enabling seamless integration and adoption of AI applications in imaging departments across the globe.



Dr. Harsh Mahajan
Chair, FICCI Health Services Committee and Founder & Chairman, Mahajan Imaging & Labs

AI is redefining the very architecture of healthcare. Its promise lies not just in efficiency, but in reimagining how care is delivered—making it predictive, personalised, and proactive. At QCIL, we view AI as a force multiplier that can bridge the gap between limited resources and limitless patient needs. The true potential of AI is in empowering clinicians to make faster decisions. As India aspires to be the healthcare capital of the world, AI will be the cornerstone of a system that is scalable, inclusive, and globally competitive.



Mr. Varun Khanna
Co-Chair, FICCI Health Services Committee and Group MD, Quality Care India Limited (Care, KIMS & Evercare)

AI, by its very nature, is fluid and adaptive, and will be able to align with real clinical workflows rather than constrain them. The best way to bring AI into the mainstream is to anchor it on clinical outcomes and build everything around that. When outcomes improve, adoption follows naturally.



Dr. Anupam Sibal
Co-Chair, FICCI Health Services Committee and Group Medical Director, Apollo Hospitals Group

Artificial Intelligence has immense potential to transform healthcare delivery in India by making it more predictive, personalised, and efficient. At Fortis, we see AI not as a replacement for clinicians but as an enabler that augments clinical decision-making, enhances patient engagement, and streamlines operations. The real opportunity lies in moving beyond pilots to system-wide adoption where AI is embedded seamlessly into workflows, aligned with national priorities, and accessible across geographies. This will be pivotal in advancing equitable, value-based care for all.



Dr. A. Raghuvanshi
MD and CEO Fortis Healthcare Limited



AI holds immense promise to transform healthcare in India by bridging critical gaps in access, affordability, and quality. At Aster DM Healthcare, we view AI as an enabler that empowers clinicians, enhances patient experience, and drives operational efficiency. The real opportunity lies in moving beyond isolated pilots to integrated, scalable solutions aligned with national health priorities. This belief has guided the creation of the Aster AI Lab in association with Indian Institution of Science (IISc), which will serve as a platform for collaborative innovation and responsible adoption of AI in healthcare. By bringing together providers, policymakers, innovators, and regulators, we aim to reimagine care models and accelerate India's journey toward a healthier, more equitable future.

Ms. Alisha Moopen
Deputy Managing Director, Aster DM Healthcare



Technology and compassion form the very foundation of the highest quality care. Over the years in the industry, I have seen how digitalisation has evolved to improve healthcare by enabling faster diagnosis and more precise treatment, while the human touch, through empathy, clear communication, and personal care, continues to play an important role in a patient's recovery. AI is truly changing the game in healthcare- from early diagnosis to post-operative recovery. At Yashoda Group of Hospitals, we believe AI is not just about technology — it's about reimagining patient experience, enabling doctors to make faster, more precise decisions, and ultimately improving health outcomes for all.

Dr. Upasana Arora
Chair, FICCI Medical Value Travel Committee and Managing Director,
Yashoda Super Speciality Hospitals



AI is redefining the future of Indian healthcare—shifting from treatment to prediction, prevention, and personalisation. It empowers clinicians, strengthening patient connection and clinical judgment. By embedding innovation and trust, AI can help build a world-class system that is equitable, compassionate, and patient-centered, advancing the vision of universal health for all Indians.

Mr. Gautam Khanna
Past Chair- FICCI Health Services Committee and CEO,
P D Hinduja Hospital & MRC



In healthcare, a second reviewer can be the difference between good and great clinical decisions — AI is that extra pair of eyes, a co-pilot that not only supports doctors but also accelerates decision-making and streamlines the triage of reports. Its meaningful use is a true value-add to the healthcare ecosystem, empowering clinicians with sharper insights, improving patient safety, enhancing efficiency, and strengthening resilience. Those who embrace AI will not be replaced — they will gain a decisive edge, as this force multiplier transforms the way modern healthcare is delivered.

Dr. Raajiv Singhal
Co-Chair, FICCI Medical Value Travel Committee and MD & Group CEO,
Marengo Asia Hospitals

AI will be transformative for healthcare of tomorrow because it can turn today's challenges into opportunities. With its ability to process massive amounts of medical data in seconds, AI will help doctors diagnose diseases earlier, even before symptoms fully appear. It will guide personalized treatment plans based on each person's unique health profile, making care more precise and effective. AI-powered robots and virtual assistants will support surgeries, patient monitoring, and home care, reducing pressure on doctors and nurses. It will also improve hospital operations by predicting patient needs, managing resources, and cutting costs. Most importantly, AI will bring healthcare closer to people, through smart apps, wearable devices, and remote consultations, ensuring timely care, even in underserved areas. This combination of speed, accuracy, and accessibility will make AI a game-changer for the future of healthcare.



Dr. Sanjeev Singh
Medical Director, Amrita Institute of Medical Sciences & Research Centre (AIMSRC), Faridabad & Chief Medical Superintendent, AIMSRC Kochi

AI in healthcare must go beyond buzzwords—it should drive affordability, accessibility, and accountability. For hospitals like ours working in Tier-2 and Tier-3 towns, AI can help us triage patients better, detect diseases earlier, and optimise scarce resources. But to make this transformation real, we need supportive policies, interoperable data systems, and ethical guardrails to ensure equity and trust.



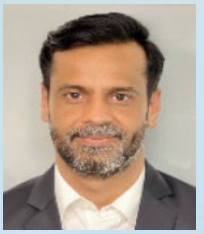
Dr. Shuchin Bajaj
Founder Director, Ujala Cygnus Healthcare Services

For patients and caregivers, care isn't a one-time event – it's a continuous journey. Yet today's healthcare systems, already stretched by episodic care, often lack the capacity to support that continuum. We believe AI can bridge this gap and make seamless, ongoing care a reality for every patient.



Mr. Asit Kumar Vidyarthi
Co-Founder & CEO, Prodoc.ai

AI connects the dots between vast untapped data, fragmented digital health systems, siloed workflows and clinical care, unlocking smarter, responsive, more efficient, and connected healthcare delivery. It transforms disconnected systems into a unified, intelligent network that delivers personalised and effective care. Providers across public and private sector can unlock huge value and efficiency by adopting AI-driven transformation to deliver better care and outcomes.



Lalit Mistry
Partner and Co-head, Healthcare
KPMG in India

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Executive summary

In the last couple of years, many providers across the globe have embarked on an exploration and experimental journey of leveraging Artificial Intelligence (AI) to bridge systemic gaps across the value chain. The early adoption and experiments of AI in healthcare across the globe indicate potential to improve access, reduce turnaround times, enhance diagnostics, and streamline operations. AI has the potential to address deep-rooted challenges in health systems like responding to rising disease burdens, workforce shortages, poor digital health adoption, and affordability of care. AI is no longer just a futuristic concept; it is emerging as a transformative force already reshaping the way care is delivered, managed, and experienced.

In India, while the potential for AI in healthcare is immense, the understanding and adoption is still in its early stages, often driven more by curiosity of AI adoption across other sectors, peer influence, or hype than as a thoughtful intervention. The current state of AI in healthcare is mainly around application of generative AI, speech recognition, agentic AI, machine learning, and robotic process automation with AI integration for streamlining processes, documentation, and select use cases for clinical care support.

Despite the proliferation of pilot projects and growing enthusiasm, many healthcare organisations find themselves stuck in the early stages of experimentation. Fragmented implementations, unclear returns on investment, and cultural resistance, particularly around trust, training, and ethical concerns that continue to hinder progress. There are distinct adoption challenges around clinical safety, ethical use, patient data protection, and regulatory compliance.

Global AI regulation is continuously evolving with adoption of diverse approaches based on their priorities and governance structures. Despite regional differences, common themes emerge like risk-based regulation, data privacy, and ethical accountability. Digital health and AI policies/guidelines in healthcare are crucial for a country like India.

Future healthcare success hinges on breaking down traditional silos through cross-functional collaboration across diverse care settings. Highly specialised clinical practices and fragmented IT systems have historically hindered coordination. AI offers a transformative opportunity to unify care pathways, enhance interoperability, and improve patient outcomes. This report underscores that true innovation begins not with the technology itself, but with a clear understanding and purpose of AI in healthcare.

AI has hundreds of applications across healthcare value chain, and this report reflects on 25+ real world uses cases from the Indian healthcare providers across:

AI in self-care and health management

AI has the potential to empower individuals to manage their health proactively through personalised tools like wearables and mobile apps that monitor vitals and lifestyle habits. Virtual health assistants offer guidance on nutrition, medication, and mental wellness, while predictive analytics help identify risks early. This fosters a more informed and preventive approach to personal health.

AI in primary care and care navigation

AI supports in enhancing primary care by enabling intelligent symptom triage and supporting early diagnosis and chronic disease management. It can facilitate seamless coordination across providers for better continuity of care.

AI in hospital care and operations management

AI can improve hospital efficiency by streamlining patient onboarding, resource planning, and diagnostics through predictive analytics and imaging tools. It supports clinical decision-making and automates documentation via AI-enabled EMRs. Additionally, AI can aid in discharge planning, robotic surgeries, inventory and claims management, and even marketing optimization.

AI in post-hospitalisation and rehabilitation

AI helps in creating post-hospitalisation personalised recovery plan and support through AI-agents, VR/AR, wearables and remote monitoring for guidance on medication and rehabilitation. Predictive tools help prevent readmissions by identifying risks early.

AI remote care and telehealth

AI is transforming remote health and telemedicine by enabling continuous care and progress monitoring from anywhere. Intelligent triage systems ensure timely escalation of cases that require physical visits, improving efficiency and patient outcomes.

Public health system and policy level

AI is helping in strengthening public health systems by using predictive epidemiology, real-time population health management, and climate-sensitive disease forecasting. These capabilities help health systems make data-driven decisions for better preparedness and efficiency.

Key considerations for AI-driven transformation

AI-driven transformation in healthcare requires a well-thought through blueprint and various key considerations that enable selection of right AI solutions that determine outcomes. This report also represents a thought for AI-driven transformation through a phased journey of enable, embed and evolve along with several key considerations that guide AI adoption.

Organisations should start with a clear purpose, rather than simply being driven by an interest in technology. Stakeholder alignment is essential, ensuring that clinicians, patients, and support staff are engaged at the outset. Evaluating the maturity of AI solutions along with their clinical accuracy, ethical considerations, and integration readiness is essential. It is equally important to assess data quality, workflow alignment, and cybersecurity to ensure effective implementation. Training and change management are vital to build trust and ensure effective use.

Governance frameworks and vendor evaluation play a key role in identifying credible and compliant partners. Demonstrating scalability and reliable performance is important, along with developing a clear business case that outlines expected benefits and return on investment. In public health contexts, additional factors such as infrastructure readiness, data accessibility, and workforce capacity also need to be considered

Tomorrow's healthcare is intelligent and seamlessly integrated. With AI at its core, people, services, and industries unite to reimagine care - uplifting and not replacing the human capabilities, to deliver smarter, more connected healthcare outcomes. This report can enable healthcare administrators across public and private sectors to explore the potential of AI in healthcare across value chains with critical enablers and guardrails that enable a successful AI-driven transformation.



Section 1

1.1 AI in healthcare: A paradigm shift in progress

> Artificial Intelligence has the potential to significantly accelerate India's economic growth, with projections from NITI Aayog suggesting it could contribute to a threefold increase in GDP by 2035. The government think tank identifies healthcare as a key sector where AI can drive transformative change—particularly in enhancing preventive care, improving diagnostic precision, and optimising treatment outcomes.
>
> **Abstract from National Strategy for Artificial Intelligence (#AIforall), NITI Aayog,**

AI is no longer a futuristic concept—it's a strategic catalyst transforming healthcare worldwide. From improving access and reducing turnaround times to enhancing diagnostics and streamlining operations, AI is addressing deep-rooted challenges like workforce shortages and rising disease burdens. By harnessing machine learning, predictive analytics, and intelligent algorithms, healthcare systems are evolving towards more personalised, efficient, and outcome-driven care. This shift isn't just technological—it's reimagining of how healthcare is delivered, with AI at its core.

In India, while the potential for AI in healthcare is immense, the understanding and adoption is still in its early stages, often driven more by curiosity of AI adoption across other sectors, peer influence, or hype rather as a thoughtful intervention. The NITI Aayog's National Strategy for Artificial Intelligence report has identified healthcare as a priority sector for AI-driven transformation. However, successful adoption requires thoughtful planning, ethical safeguards, and alignment with India's unique healthcare needs.

Healthcare organisations are increasingly experimenting with AI across a range of use cases — from clinical decision support and imaging diagnostics to administrative automation and virtual assistants. However, many are finding it difficult to translate these experiments into meaningful and sustained value.

The healthcare sector faces distinct adoption challenges

Healthcare presents a uniquely complex and diverse environment for AI adoption. Concerns around clinical safety, ethical use, patient data protection, and regulatory compliance create significant friction. Many organisations struggle to modernise legacy infrastructure, overcome data silos, and establish the governance frameworks necessary to scale AI responsibly. The highly fragmented nature of healthcare systems — often characterized by decentralised decision-making, workforce shortages and uneven digital maturity — further complicates progress.

Future healthcare success demands a new level of collaboration

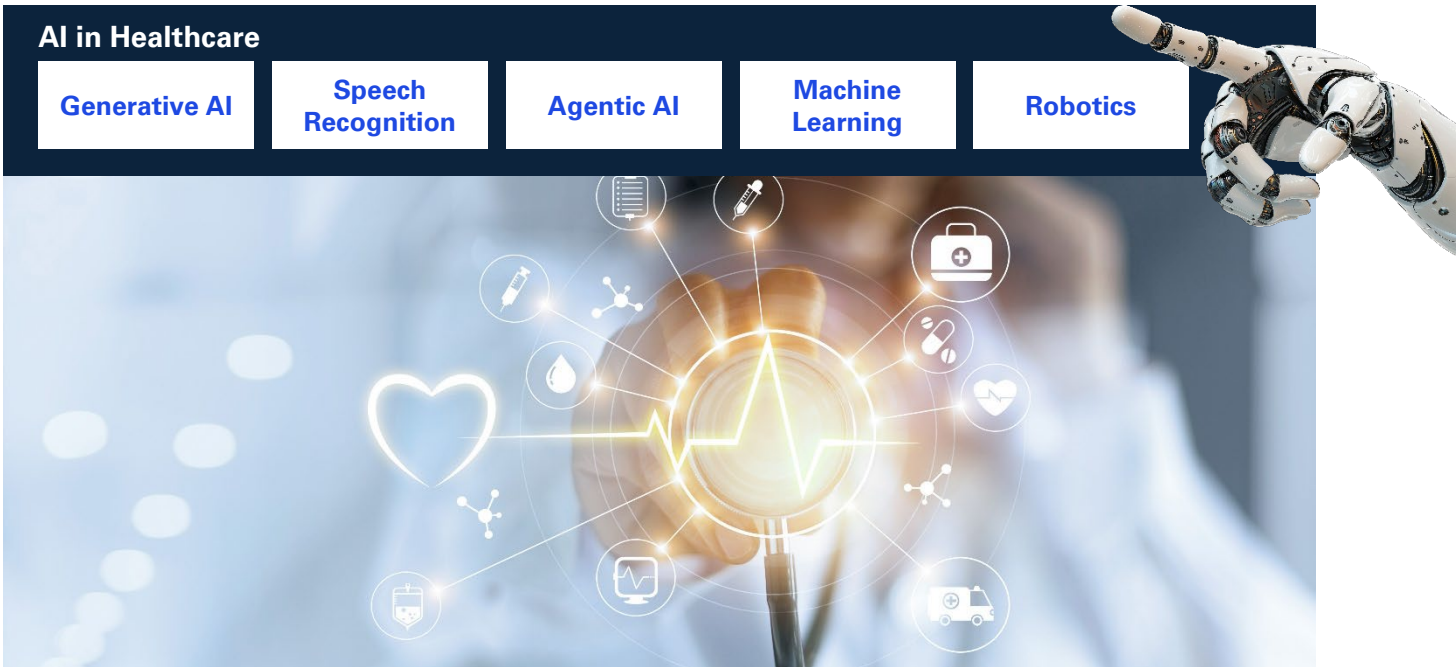
New age healthcare delivery models consistently require cross-functional collaboration and across care settings (hospitals, primary care centers, home care, rehabilitation, etc.). Clinical healthcare has traditionally been highly siloed, largely due to the depth of expertise required by specialist clinicians. Each medical specialty — whether cardiology, oncology, radiology or neurology — has developed its own highly specialised knowledge, diagnostic protocols, and treatment methodologies. This specialisation has led to fragmented care pathways, where different specialists manage specific aspects of a patient's condition without seamless coordination. Additionally, healthcare IT systems have reinforced these silos, with department-specific Electronic Health Record (EHR) systems, imaging databases, and workflow tools often lacking interoperability. AI has the potential to bridge these gaps by enabling more connected, intelligent systems that support integrated care pathways, improving coordination, efficiency, and patient outcomes.

Current state of AI evolution versus revolution

Due to the inherently human-centric nature of certain healthcare functions, AI's impact thus far has been more evolutionary than revolutionary. Rather than driving radical transformation, its role is primarily focused on streamlining processes and specific use cases.

The top AI applications used in healthcare are:

1. **Generative AI (Gen AI)** refers to artificial intelligence systems that can create new content—such as text, images, music, or code—by learning patterns from existing data.
2. **Speech recognition** is the technology that enables machines to understand and convert spoken language into text.
3. **Agentic AI** refers to AI systems capable of autonomous decision-making and goal-directed behavior, often acting proactively to achieve objectives with minimal human intervention.
4. **Machine learning (ML)** is a branch of artificial intelligence that enables systems to learn from data and improve their performance without being explicitly programmed.
5. **Robotic process automation (RPA) with AI integration** combines rule-based automation with intelligent capabilities like machine learning and natural language processing to handle complex, decision-based tasks more efficiently.



A new generation of AI agents could reshape care delivery

The emergence of intelligent AI agents has the potential to revolutionise healthcare. These agents can act as digital co-pilots, helping clinicians interpret diagnostic results, personalize treatment plans, and manage patient pathways in real time. They can also serve as virtual care navigators, supporting patients with proactive health management, appointment scheduling, and medication adherence. In administrative functions, AI agents are poised to streamline tasks such as claims processing, medical coding, prior authorization, and patient triage — unlocking significant productivity gains and improving staff experience.

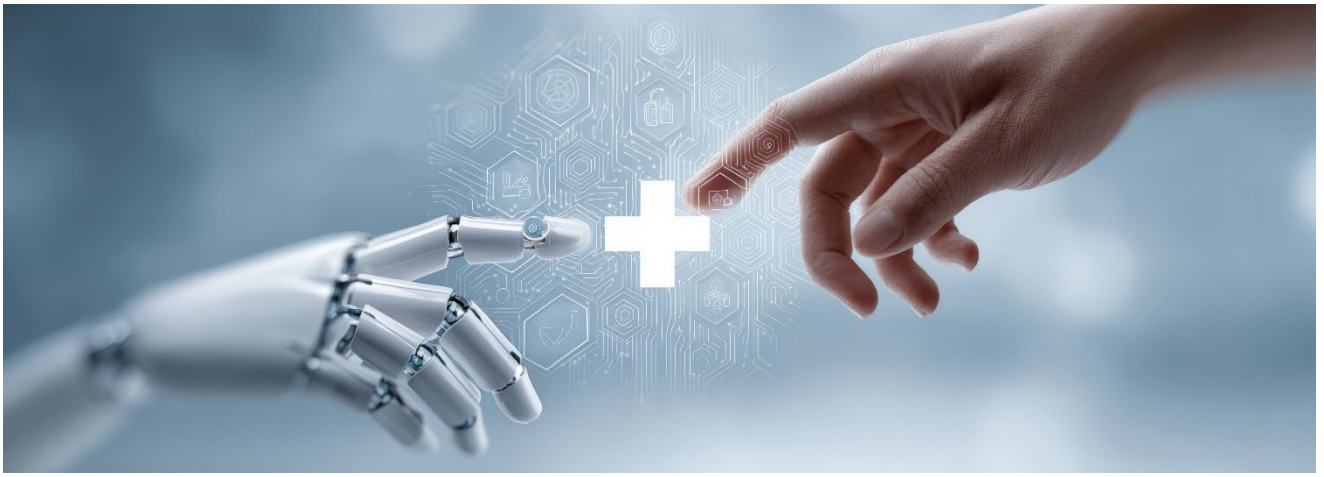
Unlike traditional AI models that rely on predefined inputs and outputs, agentic AI can interpret multimodal patient data, collaborate dynamically with medical teams, and initiate actions based on real-time clinical insights. However, to implement agentic AI successfully requires modernizing the data infrastructure to support real-time, multimodal inputs; embedding robust governance to help ensure safety, transparency and accountability; and codesigning solutions with clinicians to help ensure AI agents enhance, rather than disrupt, clinical workflows.

Moving Forward with AI in Healthcare

AI is rapidly transforming healthcare from reactive treatment to proactive, personalized care. Patients are experiencing a shift toward more predictive and preventative models, supported by AI-powered tools like virtual assistants, remote monitoring, and intelligent triage systems. These innovations are streamlining access, improving diagnostics, and enabling continuous care tailored to individual needs. At the same time, healthcare professionals are benefiting from AI-driven solutions that reduce administrative burdens, enhance clinical decision-making, and support well-being through smarter workflows and real-time documentation.

As we move deeper into this transformation, the next sections will explore how AI is reshaping key touchpoints across the care continuum—from self-care and patient onboarding to engagement, discharge planning, and claims management. Each of these areas presents unique opportunities to improve efficiency, elevate patient experience, and unlock new models of care delivery. By understanding and addressing the challenges of implementation, healthcare organisations can harness AI not just as a tool, but as a catalyst for meaningful, system-wide change.

Healthcare organisations are preparing to further integrate or explore new opportunities with AI, but in an environment where patient safety is critical, they are proceeding with caution, taking an evidence-driven approach to help ensure value-driven AI implementation that safeguards trust with the patients and healthcare.



1.2 AI and digital health: Governance framework

Global AI regulation is continuously evolving, with countries across the globe adopting diverse approaches based on their priorities and governance approaches. The European Union leads with the comprehensive EU AI Act, which classifies AI systems by risk level, and emphasises transparency, safety, and human rights [1][2]. The United States follows a decentralised, sector-specific model, with states like California enacting their own laws, while federal efforts focus on innovation and ethical use [3]. China has implemented strict sectoral regulations and algorithmic audits, aligning AI development with state interests and social values [2].

Globally, over 69 countries have proposed AI-related policies, and international bodies such as the UNESCO and OECD are pushing for ethical standards and cooperation [4]. The UN General Assembly recently endorsed a resolution to create inclusive global AI governance frameworks [5] . Despite regional differences, common themes include risk-based regulation, data privacy, and ethical accountability.

Digital health and AI policies/guidelines in healthcare are crucial for a country like India, with diverse systemic challenges across public health and private health sector like low digital health maturity, non-standardised digital infrastructure, lack of EMR, healthcare workforce shortage, low digital literacy, and limitation of financial resources. India's digital enablement is anchored in several governance and enablement initiatives by the government institutions, some of which are listed below:

National Strategy for Artificial Intelligence, 2018- NITI Aayog

The National Strategy for Artificial Intelligence (#AIForAll), released by the NITI Aayog, Government of India's think tank, outlines India's vision to harness AI for growth across key sectors. Healthcare has been identified as one of the high priority areas. The policy framework focuses on using AI for increased access and affordability of quality healthcare. It aims to address barriers to access healthcare facilities, particularly in rural areas where there are persistent issues such as poor connectivity and limited supply of healthcare professionals. It provides for possible use cases of AI and robotics in healthcare.

Key highlights:

- **AI for early diagnosis and screening –** Promotes AI-based tools for detecting diseases such as cancer, diabetic retinopathy, and tuberculosis to focus on preventive techniques. It also encourages applying AI and quantitative imaging features in radiology for accurate diagnosis.
- **Personalised treatment and drug discovery –** Encourages AI-driven research in drug development and clinical trials and also using AI to generate personalised treatment plans.
- **Early identification of pandemics –** Using AI for predictive analytics, maintaining real-time data, and identifying potential health crisis.

1. A global AI cheat sheet: comparing AI regulations across key regions
2. Global AI Law Comparison: EU, China & USA Regulatory Analysis
3. AI Dilemma: Regulation in China, EU & US - Comparative Analysis
4. Regulating Artificial Intelligence: Global Trends and Regional ...
5. Global AI Ethics and Governance Observatory - UNESCO

The Draft Health Data Management Policy, 2022 - Ayushman Bharat Digital Mission

The Draft Health Data Management Policy, 2022 is the foundational guidance framework for ensuring privacy, security, and ethical use of digital health data within the Ayushman Bharat Digital Mission (ABDM). It provide guidance on how health information is collected, processed, stored, and shared by healthcare entities participating in ABDM, including those using ABHA numbers, Unified Health Interface (UHI), and ABDM-linked platform. The policy aims to create an interoperable and citizen-centric digital healthcare ecosystem.

Key highlights:

- **Data sharing –** Healthcare providers can only share health data with Health Information Users (HIUs) after obtaining explicit consent from the patient.
- **Security and confidentiality standards –** Providers must implement reasonable security practices and execute confidentiality agreements with data processors to protect patient data.
- **Anonymised data use –** Aggregated and anonymised data may be used for clinical research, policymaking, diagnostics development, and other public interest purposes.
- **Rights of patients –** Patients have full ownership and control over their data.

Digital Personal Data Protection Act, 2023, Government of India/ Meity

The Digital Personal Data Protection Act, 2023 was passed by Parliament in August 2023. The draft rules have been published by MeitY in January 2025. The Act provides an overarching framework for digital data protection in India. Digital healthcare involves constant collecting, storing, transmission and processing of patient data such as medical history, vitals, tests conducted etc. The DPDP Act, 2023 applies to all digital personal data, including data pertaining to digital health.

Key highlights:

- **Consent –** Healthcare providers must obtain informed and written consent before processing patient data. It must also be accompanied by a clear notice outlining the purpose, type of data, and rights of the individual.
- **Purpose limitation, data minimisation, and storage safeguards –** Providers must only process and share data for specific and disclosed purposes. They must avoid collecting excessive or unrelated data. They must also implement security safeguards to avoid breaches.
- **Rights of patients (data principal) –** Patients have the right to: (i) access and confirm their data, (ii) request correction or erasure, and (iii) be informed of data sharing and processing activities.
- **Cross-border transfers –** Transfers of health data outside India are subject to government-approved jurisdictions and conditions. Healthcare providers must monitor compliance when using cloud-based international platforms.

IndiaAI Mission, 2024 - Ministry of Electronics and Information Technology

The IndiaAI Mission was adopted in 2024 by the MeitY to build domestic national-level AI infrastructure, including AI computing infrastructure and regulatory sandboxes. Healthcare is one of the mission's strategic focus areas, given its potential to improve outcomes, access, and affordability. It supports AI startups in healthcare through funding and innovation hubs. Some projects being developed under the mission are expected to be ready by 2026.

Key highlights:

- **AI Infrastructure for health innovation-** Using AI-powered solutions for easing administrative burden on healthcare staff. Developing AI-ready datasets can also enhance precision in medicine and improve disease prevention.
- **Enhancing patient outcomes -** AI identifies patterns and trends to customising treatments and personalising them, by analyzing large datasets.
- **Public-Private Partnerships:** Public institutions are collaborating with private institutions for creating digital public goods, for AI research, benchmarking and validating AI models.
- **AIKosh:** It is a national repository owned and operated by the Government of India under the IndiaAI mission and includes datasets, models, toolkits, and use case library to accelerate innovation in AI. It also includes a comprehensive clinical dataset on oral cancer imaging.



1.3 Challenges across healthcare value chain

The healthcare ecosystem involves diverse stakeholders with distinct priorities and expectations. Addressing their needs requires balancing patient-centric care, operational efficiency, workforce sustainability, technological innovation, and regulatory compliance. From patients seeking better care outcomes to policymakers crafting regulatory frameworks, AI's transformative potential must be balanced with critical considerations of safety, equity, and trust.

As digital transformation accelerates, aligning these priorities has become more complex and urgent. The key systemic challenges and gaps across the Indian healthcare value chain requires a forward-looking strategy must bridge gaps across data, people, and processes to deliver sustainable impact.

Patients and caregivers

What they value:

- Improved access to services
- Shorter Turnaround time
- Faster diagnosis
- Safe, effective and personalised treatment
- Effective communication and engagement

Value Focus Areas

Access to care: Enabling timely and equitable access to healthcare services for patients across different settings (hospitals, clinics, virtual care, community health)
Diagnosis and treatment: Efficient and accurate diagnosis followed by the initiation of appropriate, evidence-based treatments
Personalised medicine: Tailoring treatments and interventions based on individual patient characteristics, preferences and genetics
Treatment and recovery: Delivering clinical interventions, therapies, surgeries and follow-up care to support patient recovery and health improvement.

Healthcare workers

What they value:

- Reduced administrative tasks
- Improved work/life balance
- Effective Communication and coordination

Value Focus Areas

Care delivery operations: Managing the workflows, scheduling, documentation, and administrative activities that support clinical staff and help ensure care continuity
Reduce Non-Value-Added Activities: Reduce administrative, repetitive, manual and wastage of skilled healthcare resources
Effective Communication: Enhance communication, handovers, knowledge transfer and care coordination across stakeholders.

Healthcare systems / providers

What they value:

- Improved patient and workforce experiences

Value Focus Areas

Patient journey management: Orchestrating the entire patient experience across multiple touchpoints, ensuring seamless transitions between services and settings

Source: Intelligent healthcare: A blueprint for creating value through AI-driven transformation, KPMG International, 2025, KPMG in India analysis

Healthcare systems / providers (continued)

What they value:

- Operational efficiencies
- Customer retention and revenue optimisation

Value Focus Areas

Operations efficiency and profitability: Reduce turnaround time, manual processes, documentations, revenue leakage, increase conversions, asset utilisation, and profitability enhancement

Performance Monitoring and Data Driven Decision: Robust real time and holistic performance monitoring system for an effective data driven decision making for improved care outcomes and financial performance.

Policymakers and payors

What they value:

- Effective Resource utilisation
- Reduced costs
- Prevent leakages and frauds
- Improved population health

Value Focus Areas

Operational and support services: Providing non-clinical services like billing, IT management, supply chain, facilities management, and human resources that enable care delivery

Public health and prevention: Focusing on early intervention, disease prevention, vaccination programs, health education, and community health initiatives

Health Crisis Management: Multisectoral drive predictive analysis for proactive preparation and management of health crisis.

Regulators

What they value:

- Safe and effective therapies
- Approval and monitoring of medical devices and pharmaceuticals

Value Focus Areas

Therapy development and regulatory oversight: Researching, developing, testing and regulating new therapies, drugs and devices to help ensure safety, efficacy and compliance

Monitoring and evaluation: Effective implementation, resource utilisation and performance of public health programs and interventions.

All stakeholders

What they value:

- Data security and privacy
- Ethical use of technology
- Improve health outcomes

Value Focus Areas

Interoperable and secure data exchange: Facilitating safe sharing of health information across hospitals, primary care, specialists, payers, and community services

AI governance and clinical validation: Ensuring that AI and digital tools are clinically validated, explainable, unbiased, and used appropriately in patient care and operations.

AI in healthcare has application beyond clinical decision-making—it helps bridge systemic gaps across the entire value chain. From empowering individuals with self-care tools to informing policy-level strategies, AI has potential to enable smarter, more connected, and inclusive healthcare delivery.

Source: Intelligent healthcare: A blueprint for creating value through AI-driven transformation, KPMG International, 2025, KPMG in India analysis

Section 2

2.1 AI applications across healthcare value chain

AI is evolving across the healthcare value chain, moving from isolated use cases to integrated, system-wide impact. It's not just enhancing clinical decisions—it's revolutionizing how care is delivered, managed, and scaled. As AI matures, it promises to resolve long-standing bottlenecks and pave the way for a more intelligent, accessible, and proactive healthcare future.

AI has hundreds of applications across healthcare, helping bridge existing gaps and enhance patient experience, care delivery, operational efficiency, and overall health system performance. It's driving a shift toward smarter, more connected, and resilient healthcare.



AI emerging use cases in healthcare across touchpoints include:

Self Care and Health Management

- Chatbots & digital coaches for preventive guidance.
- Wearable + AI models predicting risk of diabetes, hypertension.
- Personalised lifestyle recommendations (diet, exercise, sleep)
- Voice-based vernacular AI assistants for health awareness.
- Disease management (diabetes, cardiac, TB, etc.)

Primary Care and Care Navigation

- AI-assisted triage tools for frontline health workers.
- Decision support systems for differential diagnosis.
- Automated digital documentation reducing admin burden.
- Remote consultation platforms with AI-driven symptom checkers.
- Care navigation (hospital, doctor) and coordination assistance

Hospital Care and Operations Management

- Patient onboarding, voice of customers and patient engagement
- Predictive analytics for bed/ICU/OT resource planning.
- AI-based radiology & imaging for faster diagnosis.
- Clinical decision support for evidence-based treatment.
- AI-enabled EMRs and non-clinical documentations assistance
- Discharge planning and post follow-up engagement
- Robotics-assisted surgery with AI guidance.
- Supply chain planning and inventory management
- Claim document scrutiny and rejection prediction
- Marketing and promotion planning and amplification

Post-Hospitalisation & Rehabilitation

- Personalised and dynamic recovering plan.
- Smart medication reminders with adherence tracking.
- Virtual physiotherapy & rehabilitation using computer vision.
- Predictive models to flag re-hospitalisation risks.

Remote Care & Telehealth

- Remote care and progress monitoring
- Vernacular, voice-first AI health assistants.
- AI-based translation in real-time doctor–patient interactions.
- Intelligent triage to escalate cases needing physical visits.

Public Health System & Policy Level

- AI-driven epidemiology and outbreak prediction.
- Resource optimisation models for policy planning.
- Fraud detection in insurance/ medical claims.
- Real-time population health management and risk profiling
- Continuum of care planning and outcome tracking
- Climate-sensitive disease prediction

2.2 AI in selfcare and health management

Self-care could play an important role to improve health-related outcomes with health and wellness awareness, fitness and diet planning, health screening, disease management, and rehabilitation. However, there are huge gaps in terms of authentic information, guidance and resources to support self-care across urban and rural areas. AI is bridging this gap by delivering personalized recommendations through wearables and mobile apps that track vitals, sleep, and activity, while building health histories. AI chatbots guide users through mental health techniques, nutrition apps suggest goal-based meal plans, and predictive analytics alert users to risks before symptoms appear. Automated reminders support adherence to medications and lifestyle changes, empowering individuals to take control of their health and enabling a shift toward preventive, patient-led care.

Key advantages:

- Enabling early detection of health issues through continuous vitals tracking
- Offering tailored guidance on nutrition, fitness, and mental wellness with personalised recommendations
- Building holistic health profiles by analysing microbiome, metabolome, and social factors
- Enhancing accessibility and convenience by integrating AI tools into smartphones and wearables for democratised self-care.



Case Study 01: AI as a health coach for disease management

This is an AI-powered health coach which delivers customised guidance for fitness and pain management, along with 24/7 chat-based support equipping users with tools for sleep, stress, and mood regulation, personalized nutrition plans, and a structured 30-day wellness program. The AI also provides therapeutic support aligned with medication schedules and encourages proactive behavioral engagement. This comprehensive approach enhances health outcomes as users have reported lower weight, blood glucose, and blood pressure while boosting adherence and enabling scalable and personalised care.

Case Study 02: AI for providing personalized diet plans

Leveraging AI-driven image recognition, this health app allows users to instantly identify meal ingredients and estimate nutritional content from photos, enabling seamless calorie and macronutrient tracking. It syncs with fitness trackers, visualizes progress through detailed analytics, and simplifies meal logging with real-time feedback empowering users to make smarter dietary choices and manage their nutrition and fitness with greater ease and precision.

2.3 AI in patient onboarding journey

Patient onboarding (enquiry, appointment & scheduling, etc.) in healthcare mainly through channels like telephonic, online, call center, chatbots, email, etc. face persistent challenges such as long wait times, inconsistent message intake, language barriers, and outdated legacy systems. Most of the patients struggle with digital onboarding and remain dissatisfied with patient portals due to poor integration and usability.

AI is emerging as a transformative solution by automating appointment scheduling, triage, and communication through AI chatbots and voice assistants. These AI tools reduce administrative workload, improve operational efficiency, and offer 24X7 access, enhancing patient satisfaction, regular follow-ups and minimising no-shows. Additionally, AI supports multilingual interactions and leverages predictive analytics to tailor responses, making onboarding more personalised and responsive. This helps bridge the gap between patient expectations and the realities of healthcare delivery, fostering a more seamless and personalised onboarding experience.

Key advantages:

- 24X7 automated support for appointment scheduling, triage, follow-ups and communication
- Multilingual interactions and tailored responses, making onboarding more personalised and responsive
- Reduce administrative workload, improve operational efficiency and conversions.



Case Study 01: AI being used at large multispecialty hospitals, private clinics and practices, and healthcare networks

A leading hospital has implemented an AI-powered patient engagement CRM to automate interactions, qualify leads instantly, and manage real-time appointment bookings—all integrated with its hospital management system. The solution handles 24/7 patient queries across WhatsApp, voice calls, and chatbots, while AI-driven lead scoring identifies high-value patients and boosts conversion. Real-time scheduling based on doctor availability and patient preferences ensures seamless booking with reminders. As a result, the hospital has achieved a reduction in average OPD visit time, growth in self-service adoption, and a boost in agent productivity—leading to an increase in patient satisfaction.

Case Study 02: AI being used across five hospitals as a patient conversational platform

A leading hospital chain operating across multiple cities, has implemented a Gen AI-powered conversational platform on its website that automates FAQs, health checkup information, and appointment scheduling. The chatbot delivers city-specific responses based on user location, supporting localized engagement. This solution has helped automate routine tasks, reduce wait times, and boost patient loyalty across this hospital's multi-city network.

2.4 AI for patient engagement and care continuum

Patient engagement has traditionally been fragmented, reactive, and resource-intensive, making it difficult for healthcare systems to deliver timely, personalised care. As expectations rise and digital touchpoints multiply, providers face challenges in integrating data, maintaining continuity, and responding to patient needs proactively—especially across diverse geographies and conditions.

Artificial Intelligence is rapidly transforming patient engagement by enabling more personalised, accessible, and proactive healthcare experiences. Through intelligent data integration, real-time analytics, and intuitive digital interfaces, AI-powered models empower patients with tailored insights, simplify complex health interactions, and enhance continuity of care. These innovations support mental well-being, chronic disease management, and equitable access—driving a shift toward truly patient-centric care.

Key advantages:

- AI enabled 24X7 personalized care and tailored support
- Continuous engagement for care continuum
- Improved access via multilingual, mobile-friendly tools and remote support
- Better outcomes by enabling early interventions and continuous engagement.



Case Study 01: Patient engagement and care continuum by a leading cardiac hospital chain

AI is transforming patient engagement across multiple touchpoints across a leading cardiac care healthcare chain with multiple clinics across India. This includes automating follow-ups and reminders, ensuring patients adhere to treatment plans and attend appointments. AI-powered care companions and chatbots provide 24/7 support, answering questions, monitoring symptoms, and escalating urgent issues to clinicians. Personalised diet planning and physiotherapy guidance are delivered through AI tools that adapt recommendations based on patient data. Virtual agents offer emotional support and counseling, while caregiver guidance tools help families manage care more effectively. These technologies improve continuity of care, reduce readmissions, and enhance patient satisfaction.

Case Study 02: AI for cancer care rehab at a leading hospital

AI-powered oncology chatbot that provides instant, reliable, and patient-friendly guidance on cancer care, including information on surgery, chemotherapy and radiotherapy. It also offers post-treatment care and follow-up instructions in regional languages, Hindi, and English, thereby making it highly accessible. Apart from treatment guidance, the chatbot helps patients manage symptoms and side- effects, while also providing OPD details for easy access.

2.5 AI in claims management

Healthcare claims are often slow, error-prone, and vulnerable to fraud. Manual reviews delay approvals, increase paperwork, and reduce transparency—especially in Tier-2/3 hospitals with limited digital systems. Insurers face compliance challenges, while patients experience long discharge waits and unclear billing.

AI is supporting in automating claim reviews, detecting anomalies, flagging fraud, and predicting out-of-pocket costs. It is enabling in faster, standardised processing for insurers, integrating with patient records for providers, and speeding up approvals for patients. These systems are learning from data, adapting to new fraud patterns, and prioritising high-risk claims—boosting efficiency, trust, and cost savings.

Key advantages:

- Faster claims and discharges through automated processing and accurate billing predictions
- Reduced fraud via anomaly detection and real-time risk scoring
- Improved transparency for patients, insurers, and providers with standardised, compliant workflows.



Case Study 01: AI for Claims Management & Fraud Detection

One of India's largest third-party administrators for health insurance company is managing millions of claims annually across thousands of hospitals using AI across 15,000+ hospitals, using AI to analyze 160+ data points per claim to detect fraud. Claims are scored for risk, with high-risk ones flagged for manual review. Since launch, fraud-related savings have doubled. To enable this, millions of documents have been digitized which has helped in standardising a large volume of hospital bills and policy formats. AI models are ethically trained, validated by medical experts, and monitored for bias and drift. This approach improves fraud detection, speeds up claims, and builds trust in the insurance ecosystem.

Case Study 02: AI for Co-payment and faster claim processing

One of India's largest TPAs, is using AI to predict patients' out-of-pocket expenses with a margin of just ₹500 before hospitals generate final bills. This is enabling faster settlements thereby significantly reducing discharge delays. In September 2024 alone, over 7,000 patients across large hospitals pan India were discharged without long waits, marking a major shift in improving operational efficiency and patient experience.

2.6 AI in clinical screening and diagnosis

Traditional clinical diagnosis is often slowed by fragmented patient data, limited specialist access, and diagnostic inaccuracies. These challenges lead to delayed interventions, increased cognitive load on clinicians, and inconsistent care delivery especially in resource-constrained settings. AI is transforming diagnosis by analysing vast clinical data including lab results, radiology scans, and patient histories using tools like image recognition, predictive algorithms, and NLP. It enables faster, more accurate, and personalized diagnostics, supports multilingual and multimodal inputs, reduces cognitive load, and integrates seamlessly with EHRs. By continuously learning from real-world data, AI is supporting in enhancing precision, reducing diagnostic errors, and empowering clinicians to deliver proactive, data-driven care.

Key advantages:

- Early and faster detection of diseases with data enabled care
- Improved diagnostic accuracy and reduced turnaround time
- Predictive disease and risks
- Personalized care recommendations and journey
- Improved care outcomes and operational efficiency
- Enhanced accessibility and coordination with stakeholders.

Case Study 01: AI enabled diagnosis and care response across specialty

Hospitals are deploying AI-enabled tools to optimise CT imaging workflows and enhance early detection in critical care settings. These tools improve consistency, reduce motion artifacts, and enhance image quality, resulting in increased daily CT scan volumes by significant proportions, lower image noise, and reduction in radiation exposure, significantly improving diagnostic confidence and patient safety. Complementing these innovations, radiology departments are adopting radiologist tools powered by Vision-Language Models (VLMs) that interpret scans and patient history, flag errors, and generate structured reports reducing the turnaround time from multiple days to a few hours.

While in oncology, AI is being used at precision oncology centres for assisting in diagnosis, risk identification, treatment planning, and patient education through conversational tools. Automated alerts for patient monitoring enable timely escalation and continuity of care. Additionally, in Neonatal Care Units (NICUs), AI is being used to identify septic babies within less than a day, comparatively/much faster than the traditional blood culture process. Integrated with hospital databases, the system also predicts premature labor risk in pregnant women with very high accuracy, enabling timely interventions and improving maternal and neonatal outcomes.

Case Study 02: AI enabled clinical intelligence for real-time decision support

Large healthcare platforms are collaborating with a leading cloud provider to build a Clinic Intelligence Engine (CIE) using AI/ML and generative AI models. The system supports doctors during consultations by identifying the most preferred solution for each patient in real time. It leverages large language models and securely integrates patient data from hospital systems to generate actionable insights. The AI engine operates within the hospital's infrastructure, enabling data privacy and enhancing clinical decision-making. This has resulted in faster, more informed consultations, and strengthened data security across clinical workflows.

2.7 AI in clinical and non-clinical documentation

Clinical and non-clinical documentation (forms, registers, etc.) are often weighed down by manual data entry, inconsistent information capture, and fragmented records. These inefficiencies contribute to clinician burnout, reduced time for patient care, compromised quality and accuracy of medical records. AI can streamline clinical documentation by automating data capture through speech recognition and natural language processing. It can enable real time transcription, extracts key medical information from unstructured notes and updates electronic health records with minimal manual input. Real-time access and coordination across teams via automated handovers, unified data platforms, and EMR integration. This not only improves accuracy and consistency but also reduces administrative burden, allowing clinicians to focus more on patient care.

Additionally, manual hospital discharge processes, especially in smaller hospitals are slow, error-prone, and frustrating for patients due to fragmented documentation, billing delays, and inconsistent insurance formats. Hospitals are using AI to streamline discharge by auto-generating summaries from EHRs and doctor dictation, translating instructions into patient-friendly formats, and producing insurance-ready documents aligned with ABDM/NHCX standards.

Key advantages:

- Reduced manual effort and documentation time
- Real time transcription and summarisation for clinical conversation.
- Improved accuracy and completeness
- Lowered administrative burden reducing clinician burnout
- Faster discharge, accurate billing and insurance-ready formats
- Better patient experience better through multilingual, simplified instructions.

Case Study 01: AI enabled clinical documentation across multilingual geographies

Leading hospitals across India are deploying AI-powered documentation tools to reduce paperwork and improve care delivery. Using ambient clinical intelligence and generative AI, these solutions support in capturing natural doctor-patient conversations in real time across multiple languages and dialects. Clinicians can document seamlessly through touch, speech, or ambient listening, with structured records generated automatically. Built on in-house EMR platforms, these tools read through digital and scanned patient records to create clinical timelines and smart tags so that no detail is missed. This generative AI solution can automate discharge summaries by converting structured and unstructured inpatient data into comprehensive summaries within a few minutes. This intervention has led to a significant reduction in documentation time enabling faster reporting, and accelerated lab workflows. This has helped clinicians save hours each day, resulting in reduced burnout, improved documentation quality, and more time for patient care

Case Study 02: AI enabled nurse handoffs for seamless care transitions

A large hospital network is implementing AI-powered nurse handoff solution using a cloud's generative AI and a unified data cloud to improve shift transitions. Nurses gain real-time access to patient data, enabling smoother handovers without communication gaps. Intelligent workflow automation has streamlined processes and reduced human error. The handover time has seen drop from a few hours to less than an hour with a significant improvement in efficiency. This has enhanced clinical accuracy, patient satisfaction along with millions of minutes of caregiver productivity been unlocked each month. AI-driven handoffs are impactful considering high-volume settings and saved thousands of hours annually and improve continuity of care.

2.8 AI for supply chain and inventory management

Healthcare supply chain coordinate with various stakeholders and processes to ensure timely delivery of essential medical supplies for patient care. Healthcare providers and pharmaceutical companies continues to face challenges with traditional IT systems and people driven processes that leads to frequent stock outs, increased costs, wastage (due to overstocking or stockouts), lack of end-to-end visibility and regulatory non-compliance. AI powered supply chain and inventory management platform integrated with HIMS, ERP EMR and vendor system acts as a command center giving end-to-end visibility, demand forecasting, automated inventory replenishment and ordering, contain costs, optimise working capital, and improve service levels.

Key advantages:

- Accurate forecasting, automated ordering and replenishment
- Reducing wastage and inventory carrying cost
- Assesses supplier performance and reliability.

Case Study 01: Multispecialty hospital using AI for optimizing SCM and cost

A group of hospitals are implementing an AI-powered inventory tracking system across its pan-India network to enhance the management of medical supplies. It leverages predictive analytics and real-time data for accurate forecasting of the demand for drugs and surgical equipment. This shall enable resourceful and efficient stock allocation, eventually reducing reliance on manual inventory management. This ensures the timely availability of critical medical supplies and strengthens the resilience of the hospital's supply chain. The hospital group has reduced emergency stockouts by almost half and lowered excess inventory costs, significantly improving operational efficiency.

Case Study 02: AI and blockchain technology to optimize pharma supply chains

One of the leading pharma companies is using a blockchain technology platform that provides end-to-end visibility and traceability of vaccines, gathering each vial from the manufacturer to the point of administration. By using AI-powered predictive analytics, the platform can forecast demand, identify potential disruptions and enable timely interventions. It has partnered with hospitals and airlines to launch this solution, intersecting logistics expertise, air cargo capabilities, and advanced technology. This has helped in reducing vaccine wastage and ensuring timely delivery, particularly in remote areas.

Similarly, a global pharma company is using AI to forecast demand more accurately, real-time tracking, predictive maintenance of logistics systems and automated regulatory compliance documentation. AI also enhances sales by aligning inventory with market trends and improving customer service. Overall, it boosts efficiency, reduces costs, and supports smarter decision-making.

2.9 AI for social media and voice of customer (VoC)

Managing multi-mode patient feedback sources, traditional feedback systems, and capturing online and social media feedback at scale is increasingly complex. Organizations struggle with high content volumes, fast-paced interactions, and fragmented feedback channels ranging from forms and surveys to calls and emails. Traditional methods and tools face difficulty to respond to customer sentiment in real time or act on feedback meaningfully. AI is rapidly transforming how organizations manage social media presence and capture the Voice of Customer (VoC). From analyzing sentiments in real time to automating responses and campaigns, AI-driven platforms provide organizations with the ability to adapt to customer needs across multiple channels.

Key advantages:

- 24x7 support and personalize response
- Real time sentiment analyses and action
- Automated Analysis and triggers to stakeholders
- AI chatbot and AI virtual agents responsive and cost effective.



Case Study 01: AI in Social Media Management and Analysis

Healthcare organizations have started content management and scheduling using AI to automate health-related content creation, curation, and scheduling, ensuring consistent digital presence. Sentiment and trend analysis using AI to analyze patient sentiment, track service feedback, and identify emerging health concerns in real time. Reputation and crisis management: Healthcare institutions have started using AI to monitor negative mentions and complaints, enabling faster response and protecting reputation during service disruptions or crises. Campaign optimisation using AI to run targeted awareness campaigns (e.g., screenings, immunisations), optimise content performance, and improve engagement and ROI.

Case Study 02: AI in Voice of Customer (VoC) and Feedback Systems

Integrated Omnichannel Platforms using AI-powered engagement platforms to unify patient feedback from social media, reviews, surveys, and service interactions into a single dashboard for coordinated response and communication. Automated Analysis and triggers using AI to automatically analyse patient feedback, detect recurring issues, and trigger alerts to relevant departments or SPOCs for timely resolution and service improvement. Healthcare institutions are adopting integrated VoC systems like those used in banking and aviation to improve operational efficiency, patient experience, and loyalty through data-driven insights.

2.10 AI in hospital performance management analytics

Healthcare settings have traditionally relied on siloed data and manual reporting from HIMS, ERP and traditional reporting tool for clinical, operational, and financial performance monitoring. Non-integrated system and approach provide fragmented information for decision-making, limits visibility, and hampers responsiveness to patient needs and resource demands. AI is transforming hospital performance by integrating data from HIMS, ERP, EHRs, billing systems, patient feedback, and IoT devices to deliver real-time insights and predictive analytics. It streamlines patient flow, optimizes resource allocation, supports early clinical interventions, and enhances financial planning. AI also automates compliance tasks, monitors infrastructure, and improves safety through tools like computer vision—driving efficiency and better outcomes across the hospital ecosystem.

Key advantages:

- Integrated and end to end performance visibility with automation
- Faster clinical decisions through real-time monitoring and predictive alerts.
- Proactive and predictive business performance and risk visibility
- Enhanced profitability and cost optimization
- Better resource and asset utilization and RO



Case Study 01: AI enabled Hospital Performance Management Analytics (HPM)

This AI-powered Hospital Performance Management Analytics (HPM) solution is designed to unify and analyse clinical, operational, and financial data in real time. It has an integrated analytics engine which combines data from EHRs, billing systems, and operational workflows, generates real-time dashboards by tracking KPIs across departments (bed occupancy, doctor utilisation, treatment delays, revenue cycles). In addition, it uses predictive analytics in forecasting patient volumes, resource needs, and financial risks including revenue leakages. Through automated reporting it delivers insights via web, mobile, and messaging app for instant access by clinicians and administrators. This AI solution has led to faster decision making, improved financial health, enhanced patient experience and operational transparency.

Case Study 02: AI enabled patient flow and resource planning

A hospital chain in Delhi-NCR implemented an AI-based crowd monitoring system using computer vision and night-vision cameras to track real-time crowd density. The system detects individuals, measures distancing, and triggers alerts when thresholds are breached. Staff receive alerts via mobile and dashboard, enabling quick action. Analytics help optimise space and staffing. Since its launch, the hospital saw a major drop in overcrowding incidents and improved safety—especially vital during infectious outbreaks.

2.11 AI for remote health monitoring and home care

India faces significant gaps in remote health monitoring and home care, especially in rural areas with healthcare infrastructure and resources shortage. Traditional approach and model of home care is fragmented and siloed without linkages to care settings for continuum of care. AI is helping bridge these gaps by enabling real-time monitoring through wearable devices and mobile apps that transmit vital data to clinicians. This allows for early detection of complications, personalised interventions, and reduced hospital readmissions. AI-powered remote health monitoring systems offers 24/7 data streaming even in remote areas. AI also supports home care by guiding caregivers, automating alerts, and integrating with telemedicine platforms. These innovations are making healthcare more accessible, proactive, can significantly reduce hospital admissions, and patient-centric across India.

Key advantages:

- Enables overcoming geographic barriers and increase access to care
- Continuum of care and quality of outcomes
- Lower hospital readmissions, emergency visits and reduce costs
- Early detection of complications and risks
- Proactive interventions and care planning



Case Study 01: AI powered home care by a leading hospital player with a pharma company

A leading hospital player from Hyderabad partnered with a leading pharmaceutical company for providing at-home cardiac care powered by an AI-driven digital therapeutics (DTx) platform, which bridges critical gaps in post-discharge care. Its AI algorithms can analyse patient data, including medical history, lifestyle factors, and rehabilitation progress, to create personalised rehabilitation plans. This ensures that each patient receives a tailored approach that best suits their individual needs. AI models also predicts potential risks or complications by examining large datasets, enabling proactive management of a patient's condition. This has resulted in a significant reduction in patient complaints after three months of structured rehab, with reduced readmission rates with standard care.

Case Study 02: AI in remote patient monitoring care by a leading healthcare player

An AI powered patient mobile app was launched for remote patient monitoring network and integrated with clinical devices that continuously tracks vital signs such as heart rate, ECG, SpO_2, blood sugar, and blood pressure. It interprets ECG readings and alert physicians at nearby facilities when vitals deviate from normal ranges. It also supports post-hospitalisation care and virtual consultations, extending healthcare access. This helped reduce hospitalisation and cost of care by enabling home-based monitoring and care.

Section 3

3.1 Key considerations for AI in healthcare

Any AI adoption by hospital setting or in public health programs requires a careful, holistic and multi-dimensional approach for the successful adoption. The approach and process should not be just about buying a technology solution, but a strategic transformation. Given the novelty, complexity, and risks, providers need a structured blueprint to make decisions logically.

Below are the key considerations and guidance for AI adoption in any healthcare settings or public health programs:

01

Right approach to AI adoption- use case or organisation wide

The fundamental strategic choices in healthcare AI adoption are whether an organisation should adopt AI for a particular problem/use-case or should it embark on an organisation-wide AI adoption roadmap/blueprint. The approach adopted by most of the healthcare providers across the globe is to start with a problem-focused few use-cases to build learnings and business case for an enterprise-wide AI strategy/blueprint. In case of public health sector, it is important to consider a use case approach for select public health program with clear target area of AI-solution intervention (patient engagement, IEC champaigns, AI virtual agent, disease management, disease surveillance, etc.)

02

Start with purpose- not technology

Many hospitals and public health administrators are adopting AI based on hype or peer pressure, rather than strategic need. This approach risks misalignment with actual healthcare goals and can lead to ineffective implementations. It is essential for providers to clearly define the purpose of any AI initiative—whether it's improving clinical outcomes, operational efficiency, patient experience, or public health outreach. A well-articulated strategy fosters an environment where AI investments are intentional, measurable, and built for long-term impact.

03

Stakeholders- ensure alignment

Hospital and public health administrators should begin with a clear strategic vision from leadership, complemented by a bottom-up assessment of needs from key stakeholders. Stakeholder engagement and inputs are critical, as it ensures clinicians, patients, support staff, and administrators are aligned on purpose, target problems, and outcomes. Early alignment builds ownership and a shared transformation without becoming a top-down or one more experiment. Existing technology vendor's support is equally crucially for ease of integration and data exchange.

04

AI solution maturity- experiment or established

AI solutions in healthcare progress through distinct maturity stages—starting from prototypes and proof of concept, moving to controlled pilots, early adoption, and finally reaching a mature stage. This phased approach enables that AI tools are safe, reliable, and aligned with real clinical needs. As solutions mature, they demonstrate greater trust, effectiveness, and fairness in outcomes. The maturity level also reflects readiness for large-scale deployment and integration into healthcare settings or public health systems. It helps stakeholders assess the potential impact and sustainability of AI investments.

05

Clinical accuracy and approvals- sensitivity and specificity

In case of a clinical AI solution, it must demonstrate high sensitivity and specificity across varied populations and clinical contexts. Accuracy should be proven through clinical trials, peer-reviewed validation or approvals from reputed authority/body (US FDA, EU MDR, India CDSCO, ISO/IEC, etc.). Importantly, AI tools must be benchmarked against established medical standards and human expert performance. AI should support and augment clinician decision-making, not replace it. Continuous monitoring to detect algorithm drift, monitor performance, outcome benchmarking and update AI models, as required.

06

Ethical aspects and patient safety- ultimate priority

AI solutions must uphold fairness, equity, and patient rights. This means algorithms should be free from bias related to age, gender, ethnicity, or socio-economic status. Ethical deployment also requires transparency—patients and clinicians should know how AI recommendations are generated. Speed, cost savings, or innovation should never outweigh the ethical obligation to protect patients from inaccurate or unsafe recommendations. Patient safety must be the ultimate priority.

07

Required data and technology readiness- key enablers

Understand required datasets (demographic, clinical, diagnosis, administrative, etc.) for the proposed AI use case. Assess data availability, quality, completeness, format (structured, unstructured, etc.) and data storage (system and hosting) for the proposed use case. Evaluate existing IT systems (HIMS, ERP, EMR, PACS, etc.), infrastructure readiness (hardware, cloud, etc.) and interoperability (HL7, FHIR, ABDM standards in India, etc.). In case of public health sector, it is important to assess maturity of the existing IT systems, data aspects and source application management (MOHFW, State Health Dept, etc.) since access to a hosting and database required for AI-solution becomes a bottleneck.

08

Ensure workflow and AI integration- synchronising operations

Ensure mapping of existing workflows (clinical, administrative, etc.), relevant users (patients, doctors, nurses, frontline staff, etc.) and identify where and how will AI be integrated and adds value without creating disrupting clinical care and any extra steps. The ease of integration with existing process and IT systems with a user-friendly design/solution is critical. Fragmented and non-integrated AI synchronization can lead to isolated systems that operate in silos, undermining collaboration and efficiency. This disjointed approach increases the risk of operational breakdowns, inconsistent data flows, and misaligned decision-making across the organisation.

09

Training and change management- working with AI

Key users (patients, doctors, nurses, frontline staff, IT staff, etc.) must be trained on the AI solution and must be able to seek required user guidance/help support (online/offline) to ensure effective AI adoption. Assess potential queries and resistance (role clarity, competency, job security, etc.) based on a proposed AI solution (clinical, administrative, operations, patient, IT, etc.) to ensure effective engagement, communication and change management. In case of clinical AI solution, a doctor must be communicated and trained on AI limitations, role and interpretability.

10

Privacy and cybersecurity- robust safeguards

Understanding and in-depth evaluation of data privacy and cybersecurity aspects of an AI solution are critical factors while considering adoption in healthcare as patient trust depends on secure handling of sensitive health data. AI solutions must comply with data protection laws/guidelines, ensure encryption and access controls, and be resilient to cyber threats. In absence of strong safeguards, even the most advanced AI solutions risk data breaches, regulatory penalties, and loss of public confidence.

11

Governance and accountability- framework and responsibilities

AI should not operate in a "black box." A well-defined accountability framework in terms of responsibilities of the clinician, the hospital, and the vendor for any AI solution error. Defining accountability ensures trust and protects patients from harm while safeguarding clinicians from unfair liability. A healthcare provider must establish AI governance board (clinicians, IT, ethics, legal, patient representative, etc.) to monitor data privacy, clinical outcomes, patient consents, ethical, legal compliance and overall governance. AI solution implementation and outcomes must be continuously monitored once deployed.

12

AI vendor diligence- selecting right partner

It is important to assess the company providing the AI solution in terms of their credibility, sustainability, and alignment with your needs. Key check points are – company registrations, location, track record, past/existing client references, POC/Study/regulatory approvals, partnership, pricing, maintenance & upgradation cost, support and other key parameters to ensure selection of the right AI partner. In case of an international AI-solution vendor, it is important consider responsibilities, ethical, governance, support, and regulatory approvals.

13

Scalability- performance and reliability

Use evidence-based pilots as "proof-of-value" before scaling. An AI solution must be able to scale from pilots to enterprise-level adoption without performance loss and efficiency. This means handling larger patient volumes, integrating across multiple users across departments, working reliability in diverse settings (hospital, satellite clinics, etc.) and operating with minimal human control or auto pilot basis.

Scalability also depends on interoperability with existing systems (HIS, EHR, PACS) and compliance with evolving regulations.

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Business case- cost benefit analysis

A business case must be developed for an AI solution adoption by any healthcare setting or public health sector covering clear identifications of target benefits (patient conversion, clinical accuracy, operational efficiency, care outcomes, etc.), total cost of the AI solution (pricing model, required hardware, human resources, support infrastructure, cloud, external data sources/AI model, maintenance, scalability cost, etc.) and potential return on investment (ROI) over a period. Strategically, developing business case create clear cost-benefit analysis that helps to aligns with AI-driven digital transformation and making it a forward-looking investment.

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Public health-specific considerations

Successful AI adoption in the public health sectors requires addressing several key systemic challenges and gaps that exists across the programs. Digital health and technology maturity across states and last mile limits availability of high-quality, standardised data, and systems struggle with fragmented or incomplete records. Privacy and security threats must be cautiously managed to ensure compliance with data protection regulations considering low IT systems maturity and high vulnerability. Integrating and getting required access for an AI-solution into existing legacy systems (MOHFW, state government, etc.) can be technically complex and resource intensive. Additionally, healthcare professionals need proper training and support to use AI tools confidently and effectively. Finally, the high upfront costs and unclear long-term ROI may deter investment, especially in resource-constrained public health settings.

Adopting AI in healthcare requires a deliberate and methodical strategy for safety, effectiveness, and cost-efficiency. A structured approach helps align AI efforts with both clinical and operational priorities, steering clear of decisions driven by hype or urgency. By setting clear evaluation criteria and checkpoints, organisations can better choose the right area for intervention, the most suitable AI solution and vendor, and proactively identify risks for timely adjustments. This disciplined process, supported by a capable AI team, fosters user confidence, promotes ethical and fair outcomes, and enhances the long-term viability of AI initiatives. Ultimately, these foundational steps help maximise the benefits of AI while reducing the chances of failure or wasted resources.



Section 4

4.1 Way-forward on AI in healthcare

The promise of AI in healthcare is no longer a distant vision — it is already beginning to reshape how care is delivered, managed and experienced. Yet realising its full potential requires more than isolated pilots or fragmented initiatives. It demands a clear, strategic approach grounded in healthcare's value streams, coordinated across departments, settings and disciplines, and focused on delivering collective, system-wide benefits.

AI can unlock new levels of efficiency, improve clinical accuracy, reduce workforce burdens, and support healthier populations by connecting care across hospitals, primary care, community services, and even into industries such as retail, nutrition and social care. However, successful adoption hinges on addressing foundational enablers such as data security, privacy, ethical use, and building trust with both patients and the healthcare workforce.

The future of healthcare lies not in optimising individual organisations, but in creating integrated, AI-enabled ecosystems that focus on prevention, early intervention, personalised care and seamless patient journeys. Multidisciplinary collaboration — supported and orchestrated by AI — will be central to this evolution.

Leaders must act now to design enterprise-wide AI strategies, establish strong governance, invest in workforce readiness, and prioritise initiatives that deliver tangible value. By doing so, healthcare systems can utilize AI as a catalyst for healthier societies.

The three-phase journey to become an intelligent healthcare organisation

Healthcare organisations can increase capability and value across three phases of AI transformation. This structured yet flexible framework balances the need for short-term efficiency gains with the imperative to prepare for future needs and innovation.

Enable

The Enable phase builds AI foundations and empowers people. Organisations appoint a responsible executive, create an AI strategy, identify high-value use cases, boost AI literacy, align with regulations and establish ethical guardrails. There is a focus on creating the right data infrastructure, overcoming dependencies on EMR and other systems. AI pilots are launched across functions, while cloud platforms and pre-trained models are leveraged with minimal customisation.

Embed

The Embed phase delivers value by integrating AI into workflows, products, services, value streams, robotics and wearables. A senior leader drives enterprise-wide workforce redesign and reskilling, embedding AI into operating models with a focus on ethics, trust and security. AI agents and diverse models are deployed, supported by cloud and legacy tech modernisation, while enterprise-wide data enhances operations.

Evolve

The Evolve phase uses AI and frontier technologies like quantum computing to elevate business models and ecosystems to solve large sector-wide challenges. AI can orchestrate seamless value across enterprises and partners. Emphasising ethics and trust with real-time security, this phase uplifts human potential with broad and deep workforce training, fostering a creative, innovative and value-driven future.

Source: Intelligent healthcare: A blueprint for creating value through AI-driven transformation, KPMG International, 2025, KPMG in India analysis

Intelligent organizations may have a portfolio of initiatives aimed at any phase. The ratio of effort and investment across the phases will likely vary as the organisation matures. Initially, most resources will likely focus on the Enable phase, with a small effort to explore enterprise-wide transformation. Over time, as foundational efficiencies are realised, more effort is invested in the Embed phase; with an eye on the future, long-term investments in phase three start to lay the groundwork for transformative innovation. This balancing act helps ensure that healthcare organisations can achieve immediate results and lasting impact.



Source: Intelligent healthcare: A blueprint for creating value through AI-driven transformation, KPMG International, 2025, KPMG in India analysis

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List of abbreviations

AI	Artificial Intelligence
ABDM	Ayushman Bharat Digital Mission
ABHA	Ayushman Bharat Health Account
CDSCO	Central Drugs Standard Control Organization
CIE	Clinic Intelligence Engine
CRM	Customer Relationship Management
DPDP	Digital Personal Data Protection Act
DTx	Digital Therapeutics
ECG	Electrocardiogram
EHR	Electronic Health Record
EMR	Electronic Medical Record
ERP	Enterprise Resource Planning
EU MDR	European Union Medical Device Regulation
FHIR	Fast Healthcare Interoperability Resources
FDA	Food and Drug Administration
GenAI	Generative AI
HIUs	Health Information Users
HPM	Hospital Performance Management
HIMS	Hospital Information Management System
IEC	Institutional Ethics Committee
ISO	International Organization for Standardization
ML	Machine Learning
MeitY	Ministry of Electronics and Information Technology
MoHFW	Ministry of Health and Family Welfare
NHA	National Health Authority
NHCX	National Health Claim Exchange
NLP	Natural Language Processing
NICUs	Neonatal Intensive Care Units
OECD	Organization for Economic Co-operation and Development
OPD	Outpatient Department
PACS	Picture Archiving and Communication System
RoI	Return on Investment
RPA	Robotic Process Automation
SCM	Supply Chain Management
UHI	Unified Health Interface
VR	Virtual Reality
VLMs	Vision-Language Models
VoC	Voice of Customer





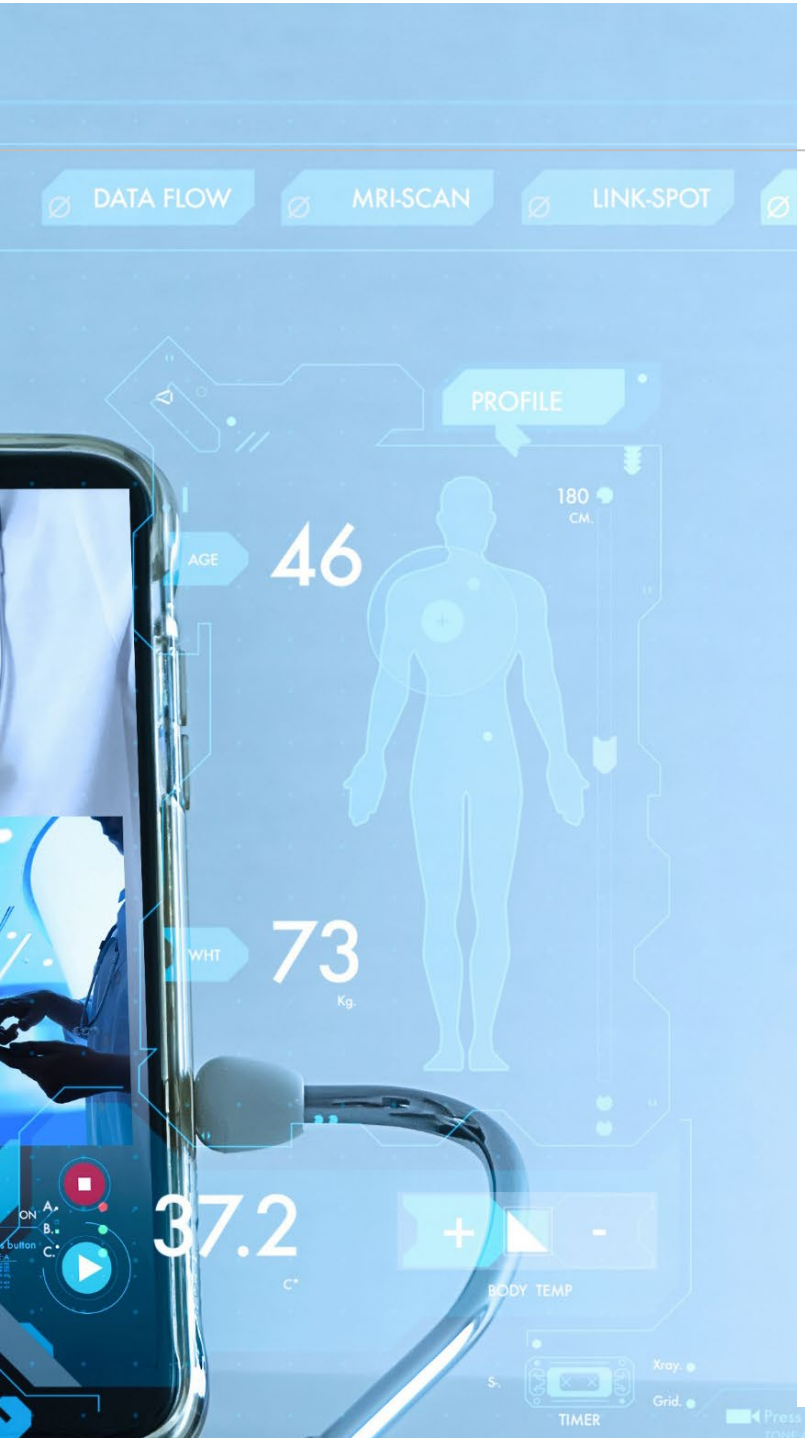
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