



Outpatient medical care centers in Germany: Supraregional growth and market concentration by ownership type

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DOI: 10.20364/VA-26.05

Abstract

Background

Medical Care Centers (MCC) are institutions in which physicians providing outpatient care work together under the sponsorship of outpatient doctors, hospitals, non-physician dialysis service providers, or other sponsors. MCC have increasingly become the focus of health policy discussions, particularly due to growing commercialization and regional concentration. This report analyzes (i) differences in the size and market concentration of MCC according to sponsor type, (ii) composition of medical specialties provided by MCC, (iii) regional distributions, and (iv) temporal developments regarding the number, structure, and distribution of MCC.

Methods

The analyses were based on outpatient billing data in accordance with §295 SGB V from 2017 to 2020, supplemented by information on the sponsors of MCC from regional physician registers. Data from the Associations of Statutory Health Insurance Physicians of Baden-Württemberg, Bavaria, Berlin, Brandenburg, Hesse, North-Rhine, Rhineland-Palatinate, Saxony, Saxony-Anhalt, Schleswig-Holstein, Thuringia, and Westphalia-Lippe were included. The analyses covered the size, market concentration, specialty structure, regional distribution, and temporal development of MCC.

Results

Between 2017 and 2020, the number of MCC practice sites and physicians increased by about one third, with the strongest growth in Baden-Württemberg (+55% and +52%) and North-Rhine (+47% and +42%). In 2020, a total of 2,217 MCC sponsors with 3,429 practice sites and 20,924 physicians were recorded. Contract-based medical sponsors accounted for almost half of all sponsors, whereas hospital sponsors employed a higher number of physicians. Market concentration varied by sponsor type, with hospital sponsors having a higher proportion of larger organizations with regard to the number of physicians and outpatient care facilities. About half of all MCC employed physicians from multiple specialties. Regionally, contract-based medical sponsors predominated in Berlin (60%), whereas hospital sponsors dominated in the eastern regions of Thuringia (77%), Brandenburg (64%), and Saxony-Anhalt (58%).

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Conclusion

MCC are important actors in outpatient medical care, and their significance continues to grow. Among the different types of sponsors, hospitals operate the largest number of MCC and thus hold a substantial share of the outpatient care provider structure. With regard to market concentration, particular attention should be paid to structural stability and resilience of the ambulatory healthcare system.

Keywords

Dialysis-provider-owned MVZ, hospital-owned MVZ, non-physician dialysis service providers, outpatient medical care center (MVZ), ownership types, physician-owned MVZ, private equity, statutory health insurance-accredited physicians

Citation

Holstiege J, Kohring C, Schreiber D, Graf von Stillfried D, Müller D. Outpatient medical care centers in Germany: Supraregional growth and market concentration by ownership type. Central Research Institute of Ambulatory Health Care in Germany (Zi). Versorgungsatlas-Report Nr. 26/05. Berlin 2026. URL: <https://doi.org/10.20364/VA-26.05>