



European
Council of
Optometry
and Optics



BLUE BOOK

2025

Trends in optics and optometry -
comparative European data

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FOREWORD

The optical and optometric sector continues to play a vital role in safeguarding vision and eye health across Europe. As the population ages and demand for accessible, high-quality eye care grows, the professions of optometry and optics stand at the forefront of meeting these evolving needs. With increasing recognition of the importance of primary eye care in public health systems, there is a pressing need for reliable, comparative information on how these professions are structured, educated, and regulated across the continent.

The ECOO Blue Book has long served as the most comprehensive resource for understanding the landscape of the optometric and optical professions in Europe. Compiled from data provided by ECOO member organisations, it offers a unique, consistent overview of how optometry and optics are practised, how professionals are trained, and the scope of services they provide. This 2025 edition continues that tradition — and takes it one step further.

For the first time, the Blue Book includes contributions from partner organisations outside of the immediate ECOO membership, offering guest chapters that enrich the comparative perspective. These additional insights highlight the growing international collaboration and shared challenges facing eye care professionals across borders.

Gabriëlle Janssen
ECOO President

Another major development in this edition is the integration of the World Council of Optometry's (WCO) updated Global Competency-Based Framework for Eye Care, which itself builds upon the World Health Organization's Eye Care Competency Framework. ECOO has aligned its data collection and analysis with this internationally recognised framework, ensuring that the Blue Book not only reflects national realities but also resonates with global standards. This alignment enables clearer benchmarking of professional roles, scopes of practice, and educational pathways — all essential for informed policy-making and workforce planning.

The aim of the Blue Book remains consistent: to provide a detailed, accurate, and comparable dataset on the professions of optometry and optics across Europe. By mapping out both the common ground and the diversity of national contexts, the Blue Book supports a deeper understanding of the opportunities and challenges within the sector. It serves as a valuable tool for educators, regulators, policymakers, and professionals seeking to advance eye care services in line with the needs of European populations.

We thank all member organisations and contributors for their collaboration in making this new edition possible. With its expanded scope and alignment to global standards, the 2025 Blue Book represents a significant step forward in documenting and supporting the evolution of eye care professions across Europe.



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Trends in optics and optometry –
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ABOUT THE BLUE BOOK AND ECOO

THE ECOO BLUE BOOK IS AN AGGREGATION OF DATA ON THE PROFESSIONS OF OPTICS AND OPTOMETRY IN COUNTRIES ACROSS EUROPE. THE AIM IS TO PROVIDE COMPARABLE AND COMPREHENSIVE DATA ON THESE PROFESSIONS TO FOSTER A BETTER UNDERSTANDING OF THE SIMILARITIES AND DIFFERENCES BETWEEN COUNTRIES.

THE BLUE BOOK IS FREELY ACCESSIBLE ON THE ECOO WEBSITE AND IS DESIGNED TO INFORM A VARIETY OF STAKEHOLDERS SUCH AS EDUCATORS, REGULATORS, POLICYMAKERS-AND PROFESSIONALS.

The European Council of Optometry and Optics (ECOO) is the European umbrella association which represents the interests of optometrists and opticians in Europe. It aims to promote eye health to the public across borders and to harmonise clinical and educational standards of optometric and optical practice throughout Europe.

ECOO vision

To improve vision and eye health by providing high-quality, cost-effective optometric and optical services across Europe.

ECOO mission

- To improve eye health and vision for all and eliminate avoidable blindness and visual impairment in Europe.
- To create a harmonised professional and educational system for optometry and optics based on the European Diploma in Optometry and the Qualification in Optics.
- To develop the scope of practice for optometrists and opticians to the degree that the same high standards apply and are mutually recognised in all European countries.

LEARN MORE ABOUT ECOO:

www.ecoo.info



DEVELOPING THE BLUE BOOK

KEY FINDINGS AND TRENDS

The new edition of the ECOO Blue Book demonstrates clear progress since the 2020 publication, reflecting the growth and evolution of optometry and optics across Europe. The number of eyecare professionals has continued to increase, and post-graduate educational qualifications have also grown in number, signalling a strong commitment to advanced training and lifelong learning. In addition, the new Blue Book offers a more comprehensive description of professional competencies, providing a clearer overview of the skills and roles within the sector.

More generally, ECOO has observed several important trends shaping the future of eye care across Europe. An increasing number of universities are aligning their curricula with the ECOO

European Diploma in Optometry, supporting greater harmonisation of education and professional standards.

There is also a stronger emphasis on prevention, particularly in the area of myopia management, alongside a growing focus on the early detection of eye disease. Ophthalmic care is becoming more multidisciplinary, with task-shifting recognising the vital role of optometrists and opticians as the first point of contact for patients and as primary eye care providers. Technological innovation continues to drive these changes, influencing both clinical practice and the patient experience. Sustainability is also gaining importance, with industry and consumers alike increasingly supporting greener practices.

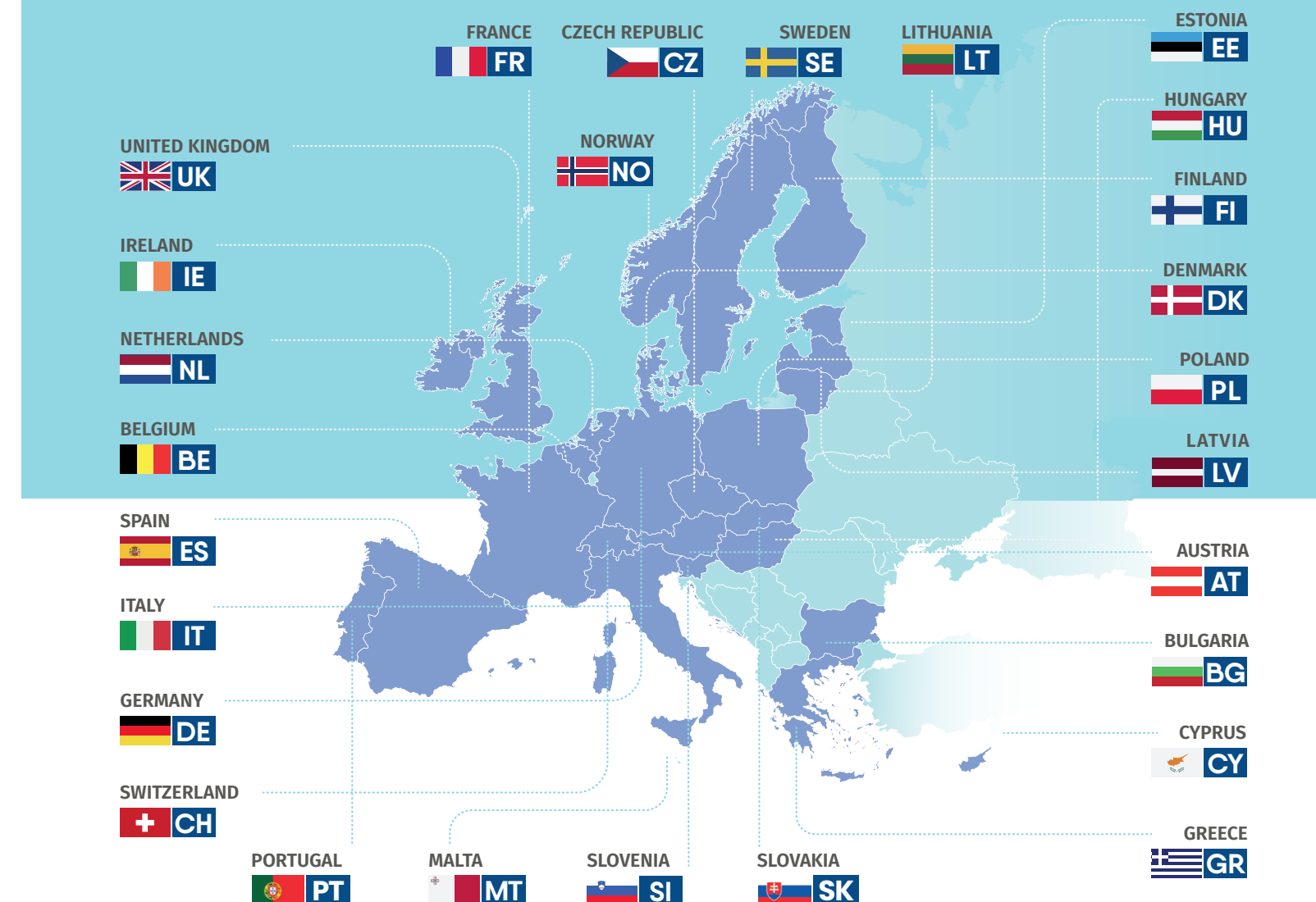
METHODOLOGY

The data has been gathered by means of an extensive questionnaire, filled in by ECOO members, who are national professional associations from 27 countries. The questionnaire was open from April to end of June 2025. The ECOO team

then held in-person meetings with most country representatives to discuss the data and clarify any questions. The data was analysed, reviewed and verified by the ECOO team based on comparisons, knowledge and available information.

DISCLAIMER

The data contained in this Blue Book has been collected as described in the Methodology and compiled in good faith. The optical and optometric sector is complex, with differing professional and regulatory landscapes across countries. Some figures may represent estimates provided to the best of our members' knowledge, while other areas may involve grey zones that allow for interpretation and would require country-specific clarification beyond the scope of this publication. In cases of doubt regarding information for a particular country, readers are advised to contact the member association that provided the data.



COUNTRIES SURVEYED

The geographic scope includes ECOO members only, representing a key membership benefit. The Blue Book questionnaire has been completed by a total of 27 countries, who are members of ECOO. Some countries have more than one professional association, in which case the different parties cooperated to provide the data. Please refer to Annex I for a full list of associations who provided the data.

ECOO ALIGNMENT TO WHO & WCO COMPETENCY FRAMEWORK

The World Report on Vision¹, published by the World Health Organization (WHO) in 2019, highlighted the impact of changing demographics worldwide on eye health and vision needs. It set out an increased need for eye care services in the areas of refractive error and presbyopia correction, and, equally important, the detection and management of chronic ocular diseases such as dry eye, cataracts, glaucoma, age-related maculopathy, and diabetic retinopathy.

This report showed that the WHO recognises the fundamental role of the eye care workforce in improving the outcomes of eye care services. In Europe that workforce includes optometrists, optician-optometrists, dispensing opticians as well as ophthalmologists and orthoptists.

In order to meet the challenges of developing the necessary workforce capacity, WHO produced an eye care competency framework (ECCF) in 2022². This was a welcome recognition of the role of eyecare and

vision in public health by the WHO, and their first policy document focussing on eye care. To complement this, the World Council of Optometry (WCO) launched their Competency Framework for Optometry³ in March 2024. This updated a previous Global Competency-based model of scope of practice for optometry (2015) and aligns with the WHO's competency framework. The WCO previously used a four level-definition of eye care services, but the new competency framework sets out competencies across five domains: 1. Refractive error, 2. Visual function assessment, 3. Ocular health and ocular disease, 4. Public health and 5. Professional practice.

The new WCO competency framework articulates levels of experience based on training duration, in line with the WHO ECCF. Specifically, this has four levels of experience, from basic training in community screening, to expert level training of 7+ years.

For further information on the European alignment with the WCO and WHO frameworks, please click [here](#)⁴.

COUNTRY ALIGNMENT TO WCO COMPETENCY FRAMEWORK

WCO/WHO Competency levels

INTRODUCTORY PROFICIENCY LEVEL 1

INTERMEDIATE PROFICIENCY LEVEL 2



ADVANCED PROFICIENCY LEVEL 3



EXPERT PROFICIENCY LEVEL 4



1. <https://www.who.int/publications/i/item/9789241516570>

2. <https://www.who.int/publications/i/item/9789240048416>

3. https://worldcouncilofoptometry.info/wp-content/uploads/2024/02/WCO_Competency-Framework-for-Optometry.pdf

4. <https://ecoo.info/wp-content/uploads/2025/09/ECOO-Position-Paper-Alignment-WCO-Competency-Framework-2025-1.pdf>

IMPACT ON BLUE BOOK

ECOO recognises the importance of the WCO's Competency Framework for Optometry and the value of moving to this format as it aligns with its vision for a common and robust European framework of education in optometry, levelling up the standard of education, strengthening the national capabilities to implement the global strategies for vision care, expanding the scope of practice, and facilitating the free circulation of citizens and professionals across Europe.

This Blue Book is therefore based on the new WCO's Competency Framework for Optometry.

THE PROFESSIONAL LANDSCAPE IN EUROPE

The way the professions are organised varies across Europe due to historic reasons. This section provides a deep dive into the primary eye care professions covered by ECOO's membership.

OPTICIAN (OPHTHALMIC AND/OR TECHNICIAN)

THE PROFESSION IS REGULATED BY LAW



AT The optician can only work under the supervision of an optometrist.

CH The title 'qualified optician' is subject to old legislation and can no longer be obtained. The higher professional examination was abolished in 2011. Only training to become a B.Sc. optometrist is now available

BE Brussels and Wallonia

THE PROFESSIONAL TITLE IS PROTECTED



ACTIVITIES ARE RESERVED TO THE HOLDER OF A SPECIFIC PROFESSIONAL QUALIFICATION



THE PROFESSION IS DEREGULATED



Authority in charge:

MINISTRY OF HEALTH (OR EQUIVALENT)



LOCAL/REGIONAL HEALTH AUTHORITY



THE PROFESSION HAS A REGULATORY BODY



LICENSES TO PRACTICE NEED TO BE RENEWED AT REGULAR INTERVALS



MINISTRY OF THE ECONOMY/COMMERCE (OR EQUIVALENT)





THE PROFESSION HAS MANDATORY CONTINUING EDUCATION OR CONTINUING PROFESSIONAL DEVELOPMENT



HAS A CODE OF CONDUCT FOR THEIR PROFESSION



 In France, two codes of conduct are needed: code to exercise (exists in France) – professionnall code (does not exist in France).

 There is an informal code of coduct drawn up and signed by associations. It is not mandatory nor national.

DISPENSING OPTICIAN

The terms «optician» and «dispensing optician» are sometimes used interchangeably. However, in some countries, a dispensing optician holds a regulated qualification that allows them to interpret prescriptions and fit eyewear, distinguishing them from unregulated optical assistants.

THE PROFESSION IS REGULATED BY LAW




THE PROFESSIONAL TITLE IS PROTECTED



ACTIVITIES ARE RESERVED TO THE HOLDER OF A SPECIFIC PROFESSIONAL QUALIFICATION



 In Switzerland, there is a nationally regulated training programme for dispensing opticians. The title of this qualification is protected. However, it is a legal requirement for professional practice only in a minority of cantons.

Authority in charge:

MINISTRY OF HEALTH (OR EQUIVALENT)




LOCAL/REGIONAL HEALTH AUTHORITY



OTHER

 CORU (Health & Social Care Professionals Council)

 General Optical Council

THE PROFESSION HAS A REGULATORY BODY



THE PROFESSION HAS MANDATORY CONTINUING EDUCATION OR CONTINUING PROFESSIONAL DEVELOPMENT



LICENCES TO PRACTICE NEED TO BE RENEWED AT REGULAR INTERVALS



HAS A CODE OF CONDUCT FOR THEIR PROFESSION



CONTACT LENS SPECIALIST

THE PROFESSION IS REGULATED BY LAW



THE PROFESSION IS DEREGULATED



- This service is offered only by registered opticians or dispensing opticians.
- Contact lens specialist is a division of the Dispensing Optician Register. All registered optometrists are entitled to fit contact lenses.

Authority in charge:

MINISTRY OF HEALTH (OR EQUIVALENT)



MINISTRY OF THE ECONOMY/COMMERCE (OR EQUIVALENT)



THE PROFESSION HAS A REGULATORY BODY



LICENCES TO PRACTICE NEED TO BE RENEWED AT REGULAR INTERVALS



THE PROFESSIONAL TITLE IS PROTECTED



ACTIVITIES ARE RESERVED TO THE HOLDER OF A SPECIFIC PROFESSIONAL QUALIFICATION



OTHER

- CORU (Health & Social Care Professionals Council)
- General Optical Council

THE PROFESSION HAS MANDATORY CONTINUING EDUCATION OR CONTINUING PROFESSIONAL DEVELOPMENT



HAS A CODE OF CONDUCT FOR THEIR PROFESSION



OPTOMETRIST

THE PROFESSION IS REGULATED BY LAW



- Note that the profession in Spain is unified as optician-optometrist

THE PROFESSION IS NOT YET REGULATED BUT A LAW IS BEING DISCUSSED



THE PROFESSIONAL TITLE IS PROTECTED



ACTIVITIES ARE RESERVED TO THE HOLDER OF A SPECIFIC PROFESSIONAL QUALIFICATION



- Optometrists are under the Optician Registry
- Optometry professional rights is currently deregulated after a group of colleagues appealed to the state Council
- The profession is not officially recognised or regulated by national law, although its practice is tacitly permitted and indirectly governed by commercial and public health regulations. The profession itself is lawful: the «optician» component is regulated, while «optometry» is governed by case law.
- Regulated in accordance with the Norwegian Health Personnel Act (paragraph 4)

Authority in charge:

MINISTRY OF HEALTH (OR EQUIVALENT)



LOCAL/REGIONAL HEALTH AUTHORITY



MINISTRY OF THE ECONOMY/COMMERCE (OR EQUIVALENT)



OTHER

- CORU (Health & Social Care Professionals Council)
- The vast majority of optometrists are also qualified opticians, so the competent authority in this case is the Ministry of Health. For those who obtained a regional diploma in optometry, the competent authority is the local authority, while for those who hold a university degree and are registered with the Order of Physicists, the competent authority is the Order of Physicists and Chemists.
- General Optical Council

THE PROFESSION HAS A REGULATORY BODY



THE PROFESSION HAS MANDATORY CONTINUING EDUCATION OR CONTINUING PROFESSIONAL DEVELOPMENT



LICENCES TO PRACTICE NEED TO BE RENEWED AT REGULAR INTERVALS



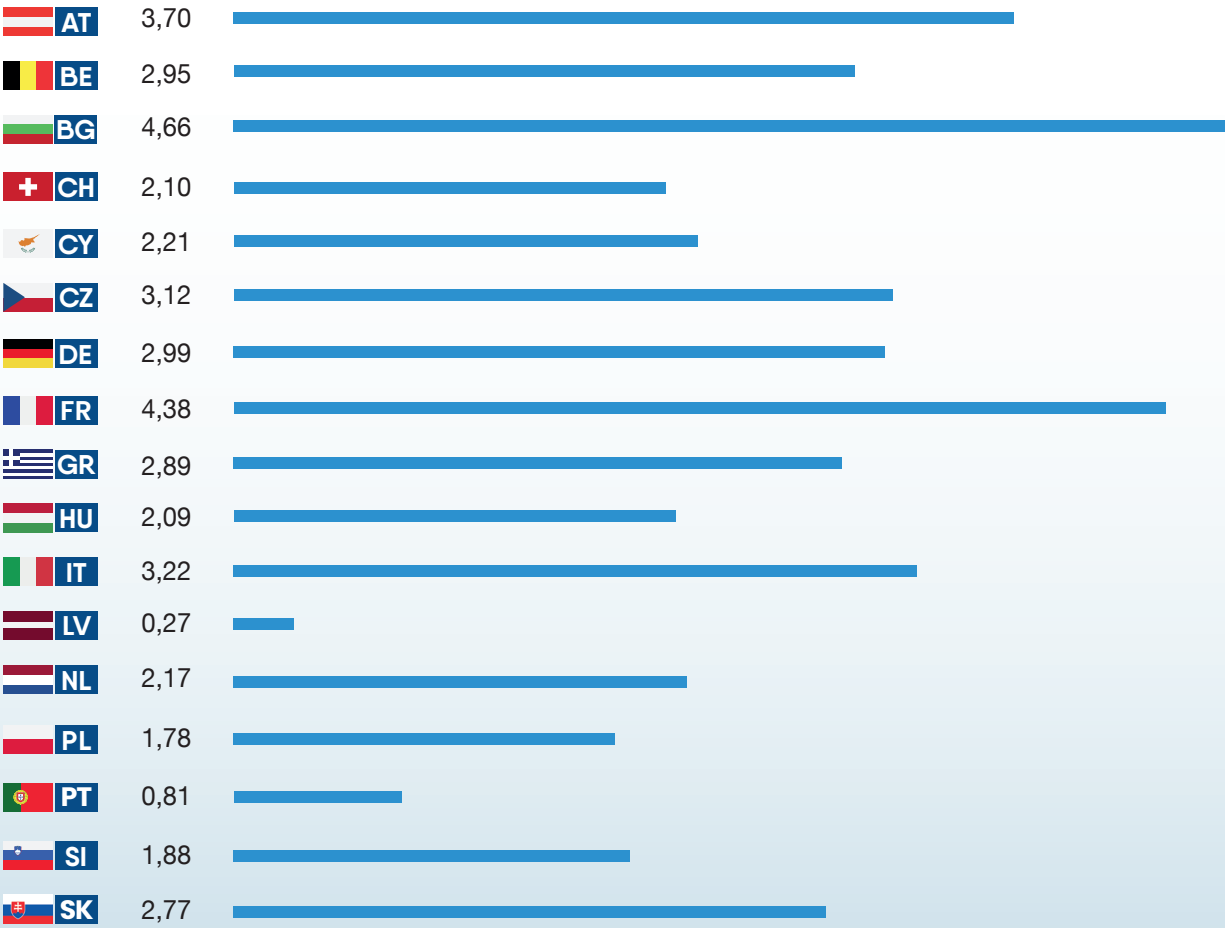
HAS A CODE OF CONDUCT FOR THEIR PROFESSION



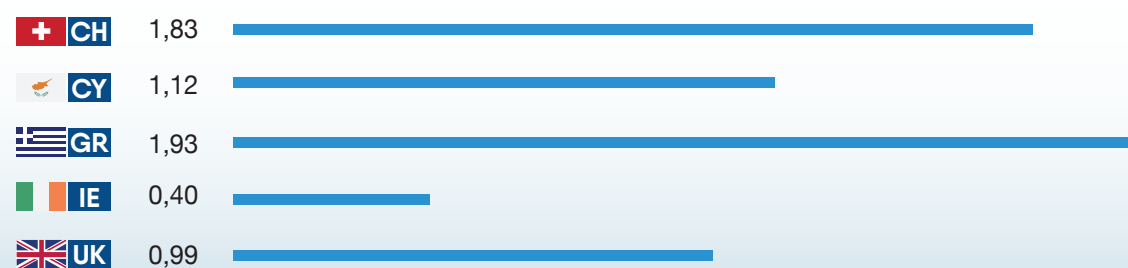
PROFESSIONS IN NUMBERS

The figures are represented in “per 10.000” population so as to allow for a comparison of the data. The population figures are based on the latest available data from the World Bank (2024). The reference to the population figures used is included in Annex II. The data provided in the graphs are collected data or estimates from ECOO’s member associations.

NUMBER OF OPTICIANS / PER 10.000 POPULATION



NUMBER OF DISPENSING OPTICIANS / PER 10.000 POPULATION



NUMBER OF OPTICIANS WHO FIT CONTACT LENSES / PER 10.000 POPULATION



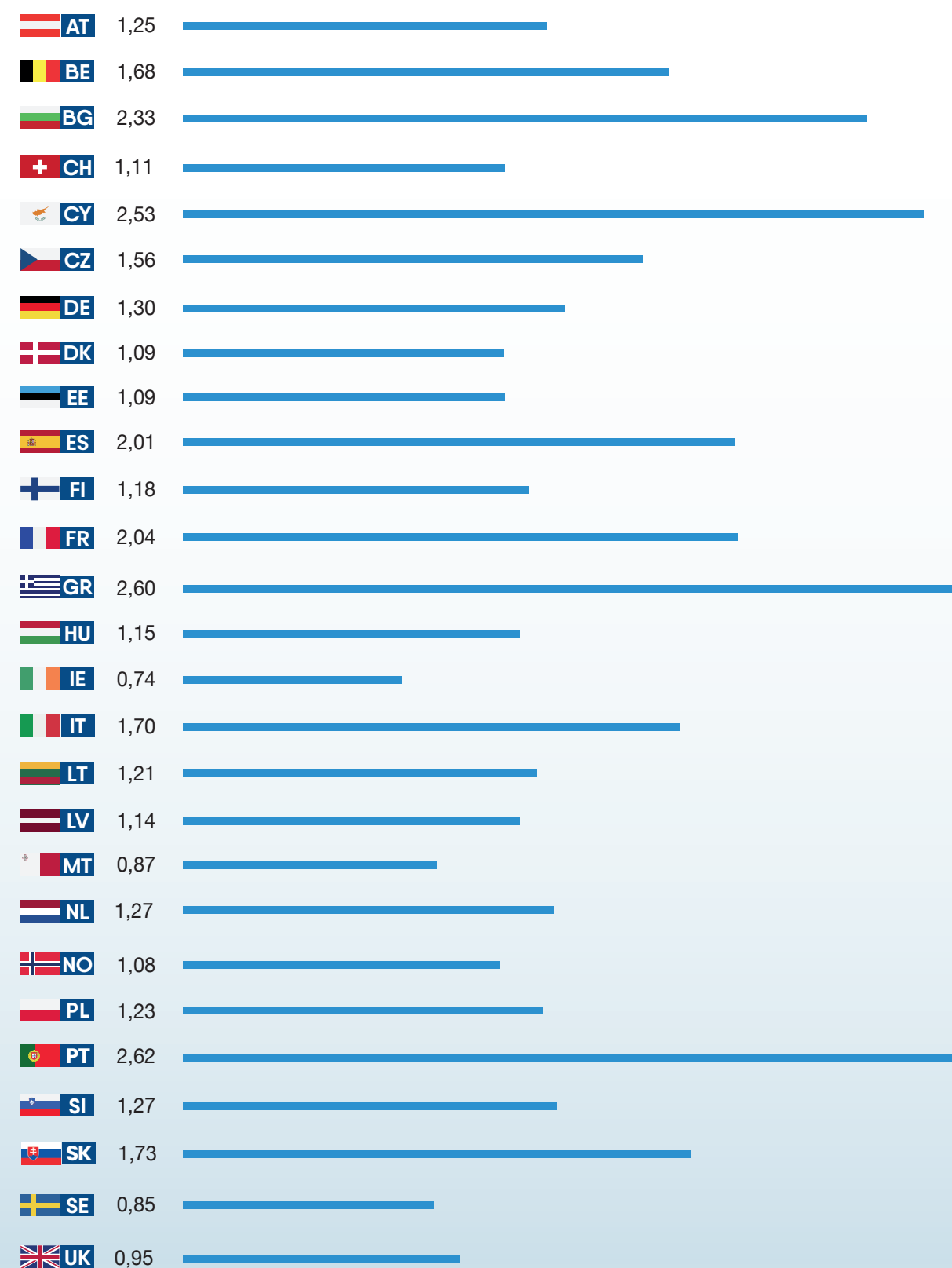
NUMBER OF OPTOMETRISTS PER 10.000 POPULATION



NUMBER OF OPHTHALMOLOGISTS PER 10.000 POPULATION



NUMBER OF RETAIL OPTICAL SHOPS/PRACTICES / PER 10.000 POPULATION



OPTICAL SHOP / PRACTICE OWNERSHIP

Requirements for owners of an optical shop or practice vary across Europe. This section provides an overview of the requirements in each country.

ANYONE CAN OWN AN OPTICAL SHOP/PRACTICE WITHOUT FURTHER REQUIREMENTS

MT

NL

PL

PT

ONLY AN OPTOMETRIST CAN OWN AN OPTICAL SHOP/PRACTICE

AT

ANYONE CAN OWN AN OPTICAL SHOP/ PRACTICE BUT THE SERVICES MUST BE PROVIDED BY A QUALIFIED EYE CARE PROFESSIONAL

BG

CH

CY

CZ

DE

DK

EE

ES

FI

GR

HU

IE

IT

LV

NO

SE

SI

SK

UK

- BE

Anyone in Flanders, an optician or an optometrist in Brussels and in Wallonia.
- CH

In most Swiss cantons, retail opticians are not subject to specific legal requirements, whereas optometric services are regulated nationwide. In a few cantons, however, retail opticians must also obtain a licence from the health authority.
- CY

Anyone can own an optical shop but the person in charge (manager) must be registered as optician / optometrist / or dispensing optician.
- CZ

Every optical shop needs a responsible professional, that is, a qualified eye care practitioner.
- ES

In Spain, there is health legislation for the opening of optical establishments that requires the appointment of a technical director, who must be a registered and licensed optician-optometrist and must always be present when the establishment is open.
- LT

Anyone, but with the regulation of state institutions.
- SK

Every official optical practice must have a responsible professional, a qualified optician with five years' experience.

SCOPE OF PRACTICE

What a professional (optometrist and/or optician) is legally allowed to do.

The scope of practice of opticians and optometrists in Europe reflects historical, educational, and regulatory variations. Originating from the craft of lens manufacturing and spectacle dispensing, the profession of optician has developed into an integral component of community eye care. Opticians play a vital role in eye care by performing a range of tasks that support optimal vision correction and contribute to the early detection of eye problems.

Core responsibilities of the optician

Opticians provide services that support both vision correction and patient management. Their principal tasks include:

- Measuring visual acuity and supporting preliminary visual assessments
- Communicating findings to patients in a clear and professional manner
- Advising and dispensing spectacles, including lens selection, frame adjustment, and technical repair
- Fitting and providing aftercare for contact lenses, where permitted by law
- Documenting and managing patient records in compliance with relevant legislation and privacy standards
- Referring patients to optometrists or ophthalmologists when further assessment or treatment is required

Role of opticians in eye care delivery

As the first point of contact for many patients, opticians enhance accessibility of eye care and contribute to the early detection of visual problems. They also provide guidance on preventive measures, such as digital eye strain and UV protection, thereby supporting public health.

Collaboration and Professional Standards of the optician

Opticians work within a broader eye care framework, collaborating with optometrists, ophthalmologists, and other healthcare providers to ensure continuity of care. Educational requirements differ across Europe, but continuous professional development is essential for maintaining competence and adapting to technological advancements.

The Scope of Practice of optometrists varies considerably in nuance and complexity across Europe and is therefore summarised in the table below.

OPTOMETRY

	AT	BE	BG	CH	CY	CZ	DE	DK	EE	ES	FI
Case history	●	●	●	●	●	●	●	●	●	●	●
Visual acuity	●	●	●	●	●	●	●	●	●	●	●
Objective refraction	●	●	●	●	●	●	●	●	●	●	●
Subjective refraction	●	●	●	●	●	●	●	●	●	●	●
Cycloplegic refraction	●	●	●	●	●	●	●	●	●	●	●
Amplitude of accommodation	●	●	●	●	●	●	●	●	●	●	●
Ocular motility	●	●	●	●	●	●	●	●	●	●	●
Cover test	●	●	●	●	●	●	●	●	●	●	●
Stereopsis	●	●	●	●	●	●	●	●	●	●	●
Binocular vision status	●	●	●	●	●	●	●	●	●	●	●
Pupillometry	●	●	●	●	●	●	●	●	●	●	●
Pupil function	●	●	●	●	●	●	●	●	●	●	●
Diagnostics in pupil testing	●	●	●	●	●	●	●	●	●	●	●
Slit lamp exam of the anterior segment and adnexa	●	●	●	●	●	●	●	●	●	●	●
Tonometry	●	●	●	●	●	●	●	●	●	●	●
Keratometry	●	●	●	●	●	●	●	●	●	●	●
Pachymetry	●	●	●	●	●	●	●	●	●	●	●
Gonioscopy	●	●	●	●	●	●	●	●	●	●	●
Corneal topography	●	●	●	●	●	●	●	●	●	●	●
Axial length measurements	●	●	●	●	●	●	●	●	●	●	●
Colour vision	●	●	●	●	●	●	●	●	●	●	●
Fundus photography	●	●	●	●	●	●	●	●	●	●	●
Funduscopy	●	●	●	●	●	●	●	●	●	●	●
Dilated funduscopy	●	●	●	●	●	●	●	●	●	●	●
Optical Coherence Tomography	●	●	●	●	●	●	●	●	●	●	●
Perimetry	●	●	●	●	●	●	●	●	●	●	●
Blood pressure	●	●	●	●	●	●	●	●	●	●	●
Providing pharmacological care, including ocular therapeutics and myopia control agents	●	●	●	●	●	●	●	●	●	●	●
Pre- and post-operative care of ocular surgical procedures	●	●	●	●	●	●	●	●	●	●	●
Informing the patient about findings	●	●	●	●	●	●	●	●	●	●	●
Refers patient (if needed) with all necessary information to the provider	●	●	●	●	●	●	●	●	●	●	●
Records the patient information in a secure system as per legislative requirements	●	●	●	●	●	●	●	●	●	●	●

- Within scope of practice
- Practised activity
- Outside scope of practice

COMPETENCES

What a professional (optometrists and/or optician) is trained and qualified to do.
Percentages of countries (total 27)

ASSESSES REFRACTIVE STATUS



RECORDS PATIENT INFORMATION AND DATA IN A CLEAR, SECURE, ACCESSIBLE, PERMANENT, AND ACCURATE WAY



PRESCRIBES CONTACT LENSES



REFERS PATIENTS TO AN OPHTHALMOLOGIST AND RECEIVES PATIENT REFERRALS



ASSESSES BINOCULAR FUNCTION (EYE ALIGNMENT, EYE MOVEMENTS, STATUS OF BINOCULARITY ADAPTABILITY OF ACCOMMODATION)



PRESCRIBES SPECTACLES AND DISPENSES SPECTACLES PRESCRIPTIONS



UNDERSTANDS AND OBSERVES THE RIGHTS OF A PATIENT TO ACCESS HIS OR HER PATIENT RECORD



UNDERSTANDS FACTORS AFFECTING THE COMMUNITY'S NEED FOR OPTOMETRIC SERVICES



ASSESSES VISUAL INFORMATION PROCESSING (VISUAL PERCEPTION)



ENABLES PATIENTS TO MAKE INFORMED DECISIONS ABOUT THEIR CARE AND THE PRIVACY OF THEIR HEALTH INFORMATION



PROVIDES ADVICE ON VISION, EYE HEALTH AND SAFETY IN THE WORKPLACE



PROVIDES A STRUCTURED, EFFICIENT, RATIONAL AND COMFORTABLE EXCHANGE OF INFORMATION BETWEEN THE EYE CARE PROFESSIONAL AND THE PATIENT



ASSESSES THE OCULAR ADNEXA AND THE EYE



MEETS LEGISLATIVE REQUIREMENTS REGARDING RETENTION AND DESTRUCTION OF PATIENTS' RECORDS AND OTHER PRACTICE DOCUMENTATION



ASSESSES CENTRAL AND PERIPHERAL SENSORY FUNCTION



COOPERATES WITH OPHTHALMOLOGISTS IN PROVISION OF PRE- AND POST-OPERATIVE MANAGEMENT OF PATIENTS



RELEASES INFORMATION FROM HEALTH RECORD AND/OR OBTAINED FROM PATIENTS ONLY WITH THE CONSENT OF THE PATIENT



LIMITS ACCESS TO PATIENT RECORDS TO AUTHORISED PERSONNEL



ADDRESSES PATIENT PRIVACY WHEN PATIENT INFORMATION IS TRANSFERRED



MAKES GENERAL OBSERVATIONS OF PATIENT



PROMOTES ISSUES OF EYE AND VISION CARE AND GENERAL HEALTH TO THE COMMUNITY



PRESCRIBES LOW VISION DEVICES



MANAGES PATIENTS REQUIRING VISION THERAPY (E.G. AMBLYOPIA, STRABISMUS, BINOCULAR VISION DISORDERS)



COLLECTS AND INTERPRETS INFORMATION FROM PREVIOUS ASSESSMENTS BY OTHER HEALTHCARE PROFESSIONALS OR FROM OTHER PEOPLE THAT IS RELEVANT TO THE PATIENT'S CARE, WITH THE PATIENT'S CONSENT



ASSESSES SIGNS AND SYMPTOMS FOUND DURING THE OCULAR EXAMINATION THAT HAVE SIGNIFICANCE FOR THE PATIENT'S SYSTEMIC DISEASE



UNDERSTANDS, EXPLAINS, RECOMMENDS, OR OFFERS SUBSIDISED EYE CARE PROGRAMMES TO ELIGIBLE PATIENTS



UNDERSTANDS AND EXPLAINS TO PATIENTS LOCAL SUPPORT SERVICES FOR VISION IMPAIRMENT AND BLINDNESS AND PREPARES RELEVANT REPORTS ON THEIR VISUAL STATUS



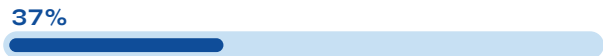
PROVIDES OR DIRECTS PATIENTS TO EMERGENCY CARE (SITUATIONS REQUIRING EMERGENCY OPTOMETRIC CARE AND GENERAL FIRST AID)



PROVIDES PATIENTS WITH OR GUIDES ACCESS TO DOMICILIARY (HOME) CARE



DEMONSTRATES KNOWLEDGE OF APPROPRIATE PRESCRIPTION OF THERAPEUTIC PHARMACEUTICAL AGENTS FOR DIFFERENT CONDITIONS



PRESCRIBES PHARMACOLOGICAL AND OTHER REGIMENS TO TREAT OCULAR DISEASE AND INJURY



Professions which normally provide eye examinations and treatment of strabismus or amblyopia in children

The majority of countries surveyed reported that the examination and treatment of strabismus or amblyopia in children is primarily carried out by ophthalmologists, particularly paediatric ophthalmologists, often working in hospital departments specialising in binocular vision disorders.

Orthoptists may also play a significant role, either independently or in collaboration with ophthalmologists, especially in the management and follow-up of these conditions. In some countries, optometrists and optician-optometrists are involved at the first point of care, referring more complex cases to ophthalmologists or orthoptists for advanced management. Overall, a multidisciplinary approach is common, with ophthalmologists leading diagnosis and treatment, supported, depending on the system, by orthoptists and optometrists.

ASSESSMENTS CARRIED OUT BY OPTOMETRISTS AND/OR OPTICIANS

This section looks at the assessments carried out by optometrists and/or opticians across Europe in relation to driving as well as services provided to children.

TESTING DRIVERS SIGHT (FOR OFFICIAL GOVERNMENTAL USE)



TESTING THE VISION OF AND PRESCRIBING SPECTACLES TO CHILDREN



A SPECIAL QUALIFICATION IS NEEDED TO TEST VISION AND PRESCRIBE SPECTACLES TO CHILDREN



FITTING AND SUPPLYING SPECTACLES TO CHILDREN



FITTING AND SUPPLYING CONTACT LENSES TO CHILDREN



In most countries, these competences are limited to optometrists or professionals with specific specialisations, with varying age restrictions that often require referral to ophthalmologists for younger children.

For detailed, country-specific rules on age brackets and conditions, please consult the relevant national association; the purpose here is simply to present the overall picture of services provided to children under the age of 18.

STANDARD EYE EXAMINATIONS

There is broad consistency in what is typically included in a standard eye examination in countries across Europe. Most countries report that a routine exam normally involves taking a case history, performing objective and subjective refraction, assessing near and distance vision, accommodative function, evaluating binocular vision and ocular motility, and checking pupil responses.

A standard examination in many countries generally also includes assessment of the anterior and posterior eye (without dilation) and measurement of intraocular pressure (tonometry). While more specialised procedures such as dilated posterior segment examination, visual field testing, or blood pressure measurement are

important clinical tools, they are in most cases not routinely part of a typical exam and are usually carried out only when clinically indicated.

Communication with the patient is also considered a standard element of the eye examination. Most countries include discussion of the findings, advice on the recommended interval before the next examination, issuing a prescription for spectacles or contact lenses, and referral to a general practitioner or ophthalmologist when necessary.

ECOO has published a Position Paper describing a comprehensive optometric vision examination, which can be accessed [here](http://ecoo.info/wp-content/uploads/2025/08/ECOO-Contents-of-Vision-examination-Position-Paper-April-2025.pdf)⁵.

COUNTRIES WHERE THE CONTENT OF THE EYE EXAMINATION IS REGULATED



Professions which normally provide eye examinations in adults across Europe

In most of the 27 countries surveyed, eye examinations for adults are commonly provided by optometrists and ophthalmologists, with optometrists typically serving as the primary providers of routine vision exams and community eye care. Ophthalmologists play a significant role, especially for more complex or medical eye conditions. Some countries additionally involve opticians, orthoptists, or other eye care professionals in

providing examinations. There are also reports of eye care professionals working in optical practices increasingly taking on this role due to long waiting lists in ophthalmology clinics. Overall, the delivery of adult eye exams is most often a shared responsibility between optometrists and ophthalmologists, depending on the healthcare structure and regulations in each country.

⁵ <http://ecoo.info/wp-content/uploads/2025/08/ECOO-Contents-of-Vision-examination-Position-Paper-April-2025.pdf>

EDUCATIONAL LANDSCAPE

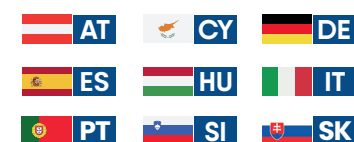
Education represents the basis for professional development. This section provides an overview of the different educational qualifications that exist in each country.

OPTICIAN/OPTOMETRIST QUALIFICATIONS

13 DIPLOMA IN OPTICS/ DISPENSING OPTICS



9 DIPLOMA IN OPTOMETRY



23 BACHELOR IN OPTOMETRY



1 DIPLOMA IN REFRACTION



5 BACHELOR IN OPTICS



16 MASTER IN OPTOMETRY

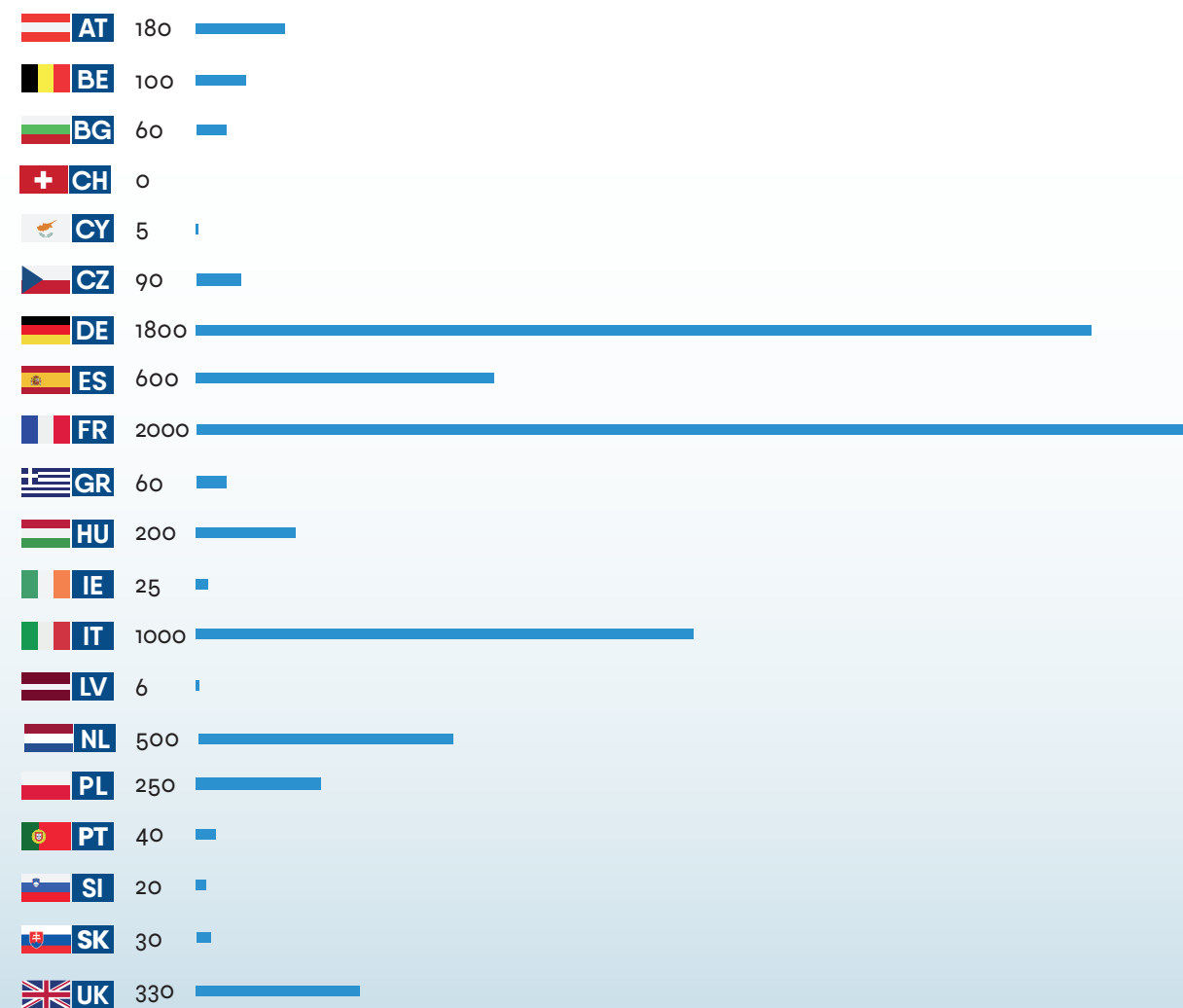


15 PHD IN OPTOMETRY



NUMBER OF STUDENTS ENTERING PROFESSION EACH YEAR
(INCLUDING IF THEY HAVE BEEN EDUCATED ABROAD)

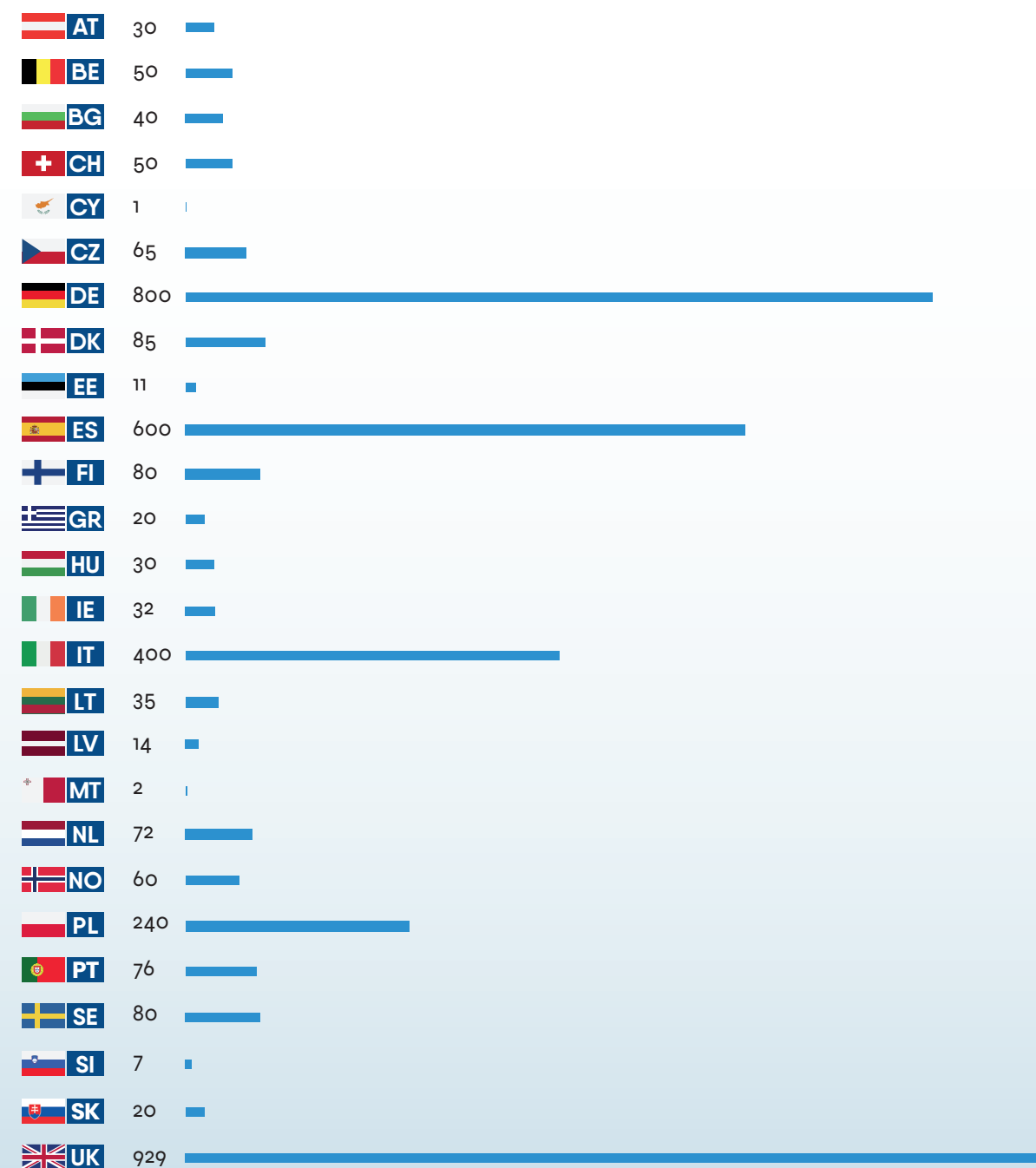
OPTICIAN



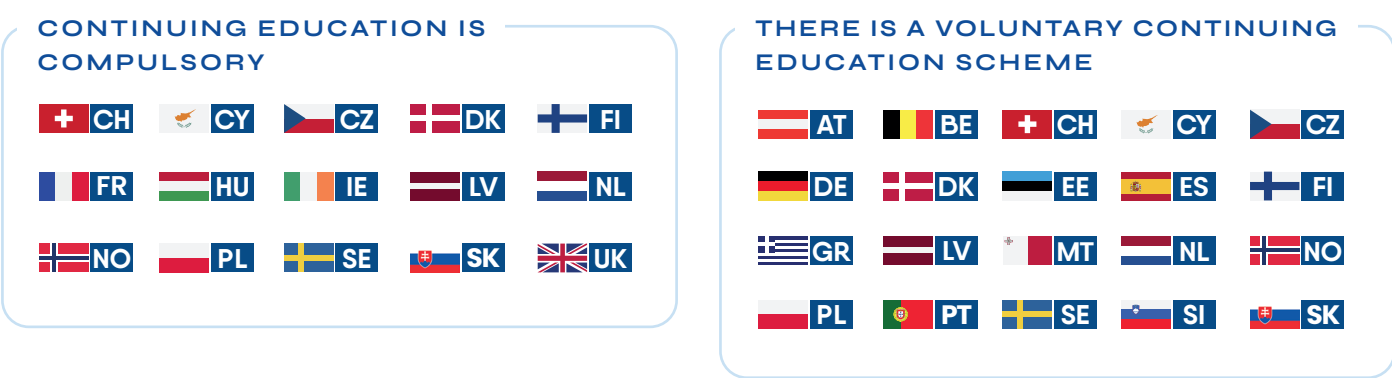
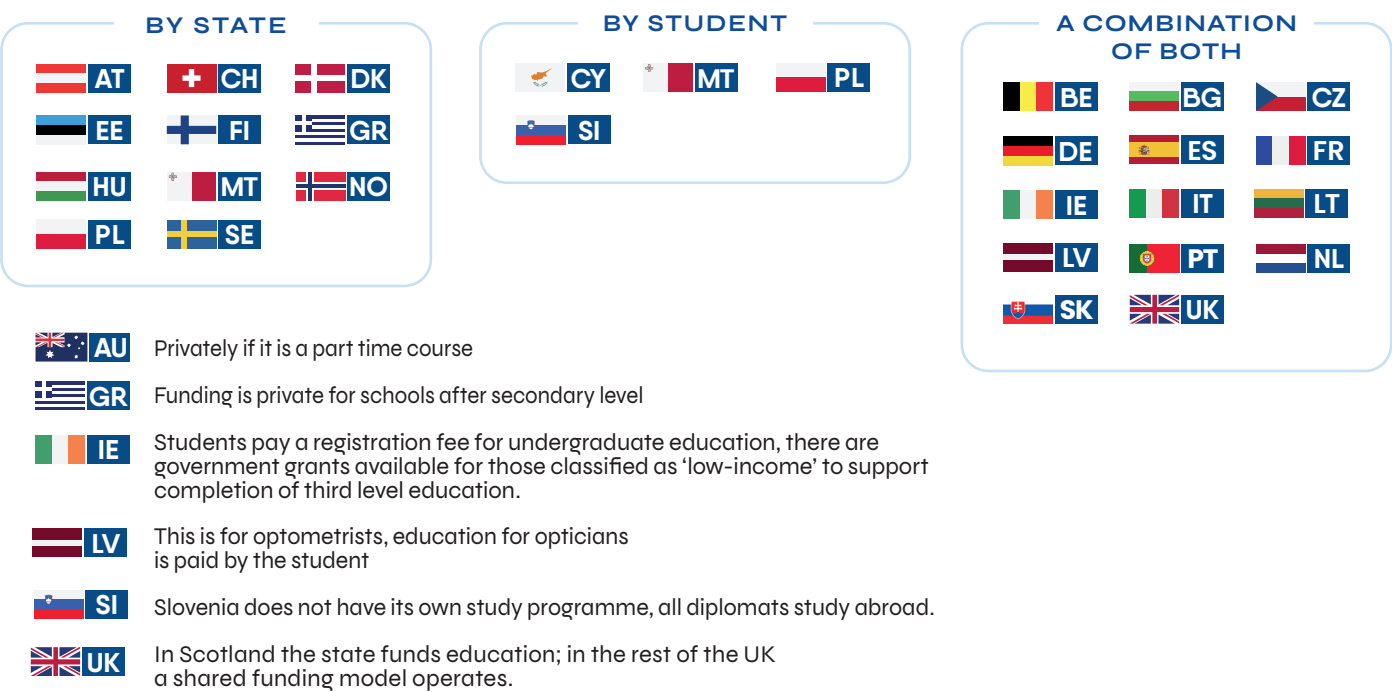
CONTACT LENS SPECIALIST



OPTOMETRIST



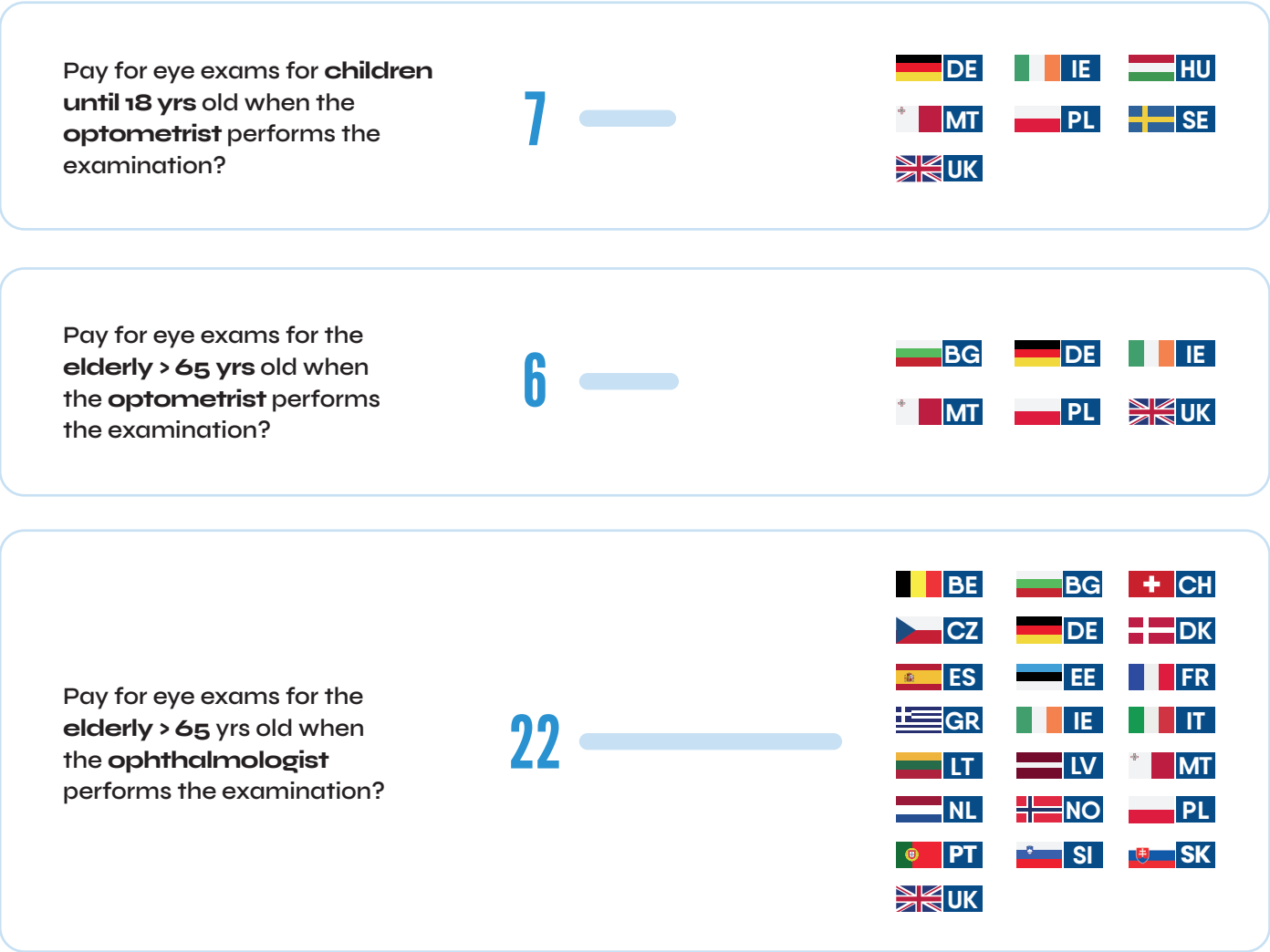
FUNDING OF EDUCATION



PROFESSIONS' ROLE IN PUBLIC HEALTH

The professions' role in public health provides an overview on how well professional services are integrated in the national health/care system and what key differences we can observe across Europe.

DOES THE SOCIAL SYSTEM (NUMBER OF COUNTRIES):



Pay for eye exams for **adults > 18 yrs with low vision** when the **optometrist** performs the examination?

5



Pay for eye exams for **adults > 18 yrs with low vision** when the **ophthalmologist** performs the examination

24



Pay for the eye exams for **people with low income/unemployed** when the **optician/optometrist** performs the examination?

8



Pay for the eye exams for **people with low income/unemployed** when the **ophthalmologist** performs the examination?

18



Provide for **disability entitlement** when the **optometrist** performs the examination?

1



Provide for **disability entitlement** when the **ophthalmologist** performs the examination?

22



Pay for eye exams for **all people** when the **optometrist** performs the examination?

2



Pay for eye exams for **all people** when the **ophthalmologist** performs the examination

23



GUEST CHAPTERS

For this edition of the Blue Book, ECOO has invited two partners to contribute with guest chapters. The aim is to present more perspectives and complementary data, from areas of the sector that they are the experts in, thus enriching the data collection. Our partner contributing in this edition are:

NielsenIQ (NIQ):

A global leader in consumer intelligence and retail data analytics, NIQ provides insights into market trends, shopper behavior, and brand performance across the Tech and Consumer Durables (T&D) industry (powered by GfK intelligence), consumer packaged goods space, and more. ECOO and GfK (now a part of NIQ) entered into a partnership in 2021, to make GfK's Optics trends and insights available to ECOO's members and to promote the inclusion of those members' data into the GfK reporting.

EuromContact:

The European association representing the contact lens and lens care industry, promoting dialogue with stakeholders and advocating for a fair regulatory environment in Europe. ECOO and EuromContact have cooperated on various topics, whether of legislative or economic nature, for over 20 years, each bringing their respective association's perspective and knowledge to the issues at stake. ECOO's affiliates Johnson & Johnson and Alcon are members of EuromContact.

Disclaimer: The data and views provided in these guest chapters have been provided directly by the respective organisations and have not been gathered by ECOO or its members directly.



LOOKING TOWARDS THE FUTURE: TRENDS IN THE EUROPEAN OPTICAL MARKET

By Sarah Bartz, Global Strategic Insights Director

The eyewear and contact lens market has undergone notable shifts in recent years, shaped by an evolving retail landscape, rising health awareness amongst consumers and advances in technology. Despite household financial pressures, consumers are elevating health and wellness as a priority over more discretionary spending.

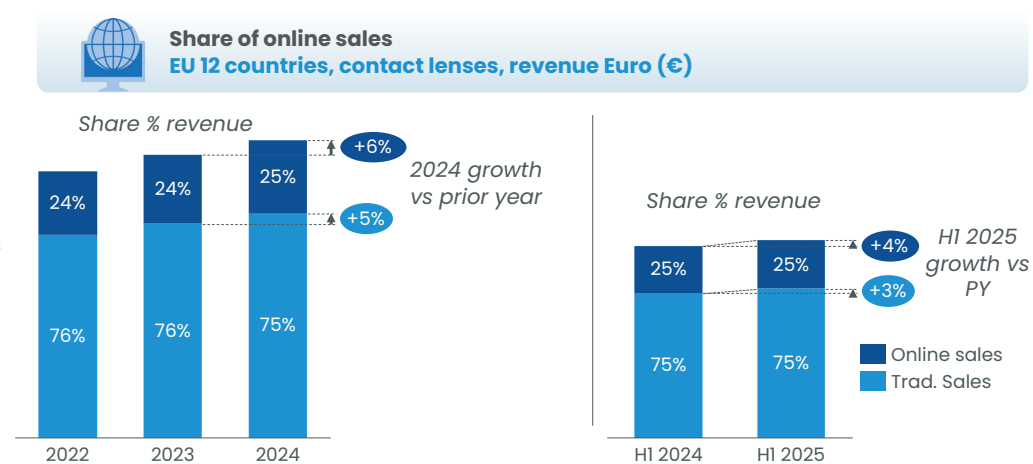
Recent market developments

Higher prices and a consumer trend towards more expensive options – daily contact lenses, progressive spectacle lenses, and fashionable and quality frames – has led value growth to outpace volume growth. In the first half of 2025 across the tracked European market, spectacle lenses grew 4% in value and 2% in volume, frames grew 4% in value and 2% in volume and contact lenses grew 3% in value but remained flat (0%) in volume¹.

Online sales of contact lenses – including both pure-play e-commerce and click-and-mortar models – have grown by 3.5% in value, slightly outpacing the 2.9% growth seen in traditional retail channels². However the share of market that online sales captures is steady, meaning there is no displacement of the traditional retail sales instore across optics retail channels.

A growing number of retailers are combining digital convenience with in-store expertise – known as omnichannel – and trusted eye care providers recommendations: putting consumer needs at the heart of an omnichannel strategy is key.

■ Online sales
■ Trad. Sales



Source: NIQ (GfK) Market Intelligence, Contact Lenses, EU: GB, DE, NL, PL, DK, NO, SE, ES, IT, FR. Online includes Click & Mortar sales. H1 = January to June period. Note fixed currency exchange rates used for non-EU countries.

¹ NIQ Market Intelligence, Spectacle Lenses: IT, DE, FR, ES, Spec. Frames IT, DE, FR, ES, GB. Contact Lenses: EU12: IT, FR, ES, DE, GB, DK, IE, NL, PL, NO, SE, CH. Fixed exchange rate EUR currency, value sales.

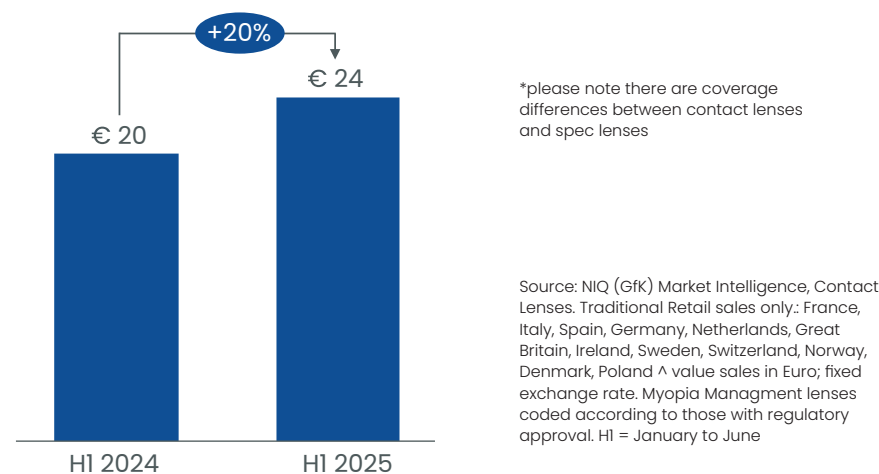
² : NIQ Market Intelligence, Contact Lenses: EU12: Online sales vs traditional sales

Shifting consumer preferences

69% of people worldwide in 2025 agree that health and fitness is an important part of their lifestyle, up 4 percentage points vs 2019³. Preventative health is also important, with personal diagnostics and core wearables products seeing continued demand. Within the optics sector, sales of myopia management lenses are growing double-digit, reflecting the trend towards protecting eyesight in children and taking preventative action early⁴.

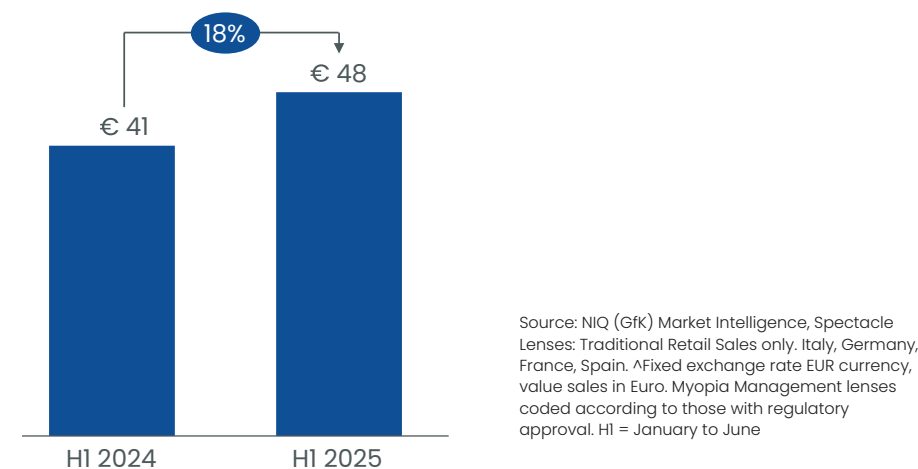
Contact lenses | EU12 | Myopia Management

Sales Millions €Euro



Spectacle lenses | EU4 | Myopia Management

Sales Millions €Euro



¹ NIQ Market Intelligence, Spectacle Lenses: IT, DE, FR, ES. Spec. Frames IT, DE, FR, ES, GB. Contact Lenses: EU12: IT, FR, ES, DE, GB, DK, IE, NL, PL, NO, SE, CH. Fixed exchange rate EUR currency, value sales. Volume in Units, for contact lenses expressed in monthly equivalent volume pieces for 2 eyes.

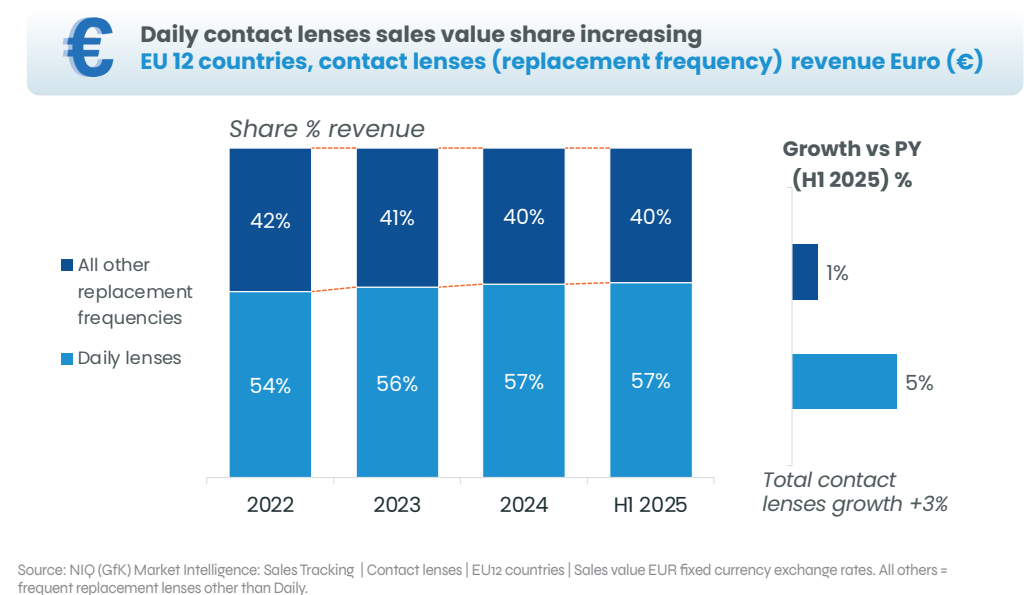
² NIQ Market Intelligence, Contact Lenses: EU12: Online sales vs traditional sales. Jan-June 2025 revenue growth vs prior year period, in sales value Euros.

³ NIQ Consumer Life global survey, 2025. Core 18 countries, n = 28,629. % consumers who rated item as 6 or 7 on a 7 point scale of importance.

⁴ NIQ Market Intelligence. Myopia Management approved lenses – Spectacle lenses (EU4: France, Italy, Spain, Germany) and Contact lenses (EU12)

Seeking products that make life convenient is another important consumer trend worldwide. Daily disposable contact lenses have become a major growth driver of the category, now representing over half of all contact lens sales. This highlights consumers' increasing preference for comfort and flexibility - enabling them to effortlessly switch between contact lenses and glasses as they study or work from home, and transition smoothly to life on the go.

Growth of daily contact lenses



Technology

Health tech is evolving toward proactive monitoring and personalised care. According to NIQ's 2025 Health & Wellness survey, 51% of respondents across 9 European countries would use a digital device or app that tracks daily health and offers tailored recommendations. Nearly half are also willing to pay a premium for personalised health and wellness products⁵.

While adaptive lens technologies and smart contact lenses are still in their early prototype stages, other trends are already here. Smart glasses, for instance, are gaining momentum—sales revenue in European optics retail channels tripled between 2023 and 2024⁶. More manufacturers are entering the space through strategic partnerships, typically pairing a tech-focused company with an eyewear specialist, emphasising both functionality and aesthetics. The positioning of glasses as the next generation of wearables highlights their potential as a hands-free, convenient option while also reinforcing the central role of vision in how we interact with and experience the world.

⁵ NIQ Global Health & Wellness Survey, 2025. 9 countries: FR, DE, IT, NL, ES, UK, CZ, PL, HU, 1000 respondents per country.

⁶ NIQ Market Intelligence, Tech Glasses: IT, DE, FR, ES, GB.

Looking ahead: the NIQ view

As populations age, digital lifestyles expand, and health consciousness rises, the European optical sector is well-positioned for sustainable growth.

Whilst eye care is a necessity, it is also important to recognise that it is not immune to or untouched by broader consumer trends and habits - like convenience, personalisation and proactive health management. In this evolving landscape, the human connection, clinical expertise, and patient education remain at the heart of effective care. Yet, by thoughtfully embracing digital tools and online platforms, eye care professionals can complement and enhance traditional practice and meet evolving patient expectations in new and different ways.



CONTACT LENSES IN EUROPE: MARKET DYNAMICS, CONSUMER TRENDS, INNOVATION & SUSTAINABILITY

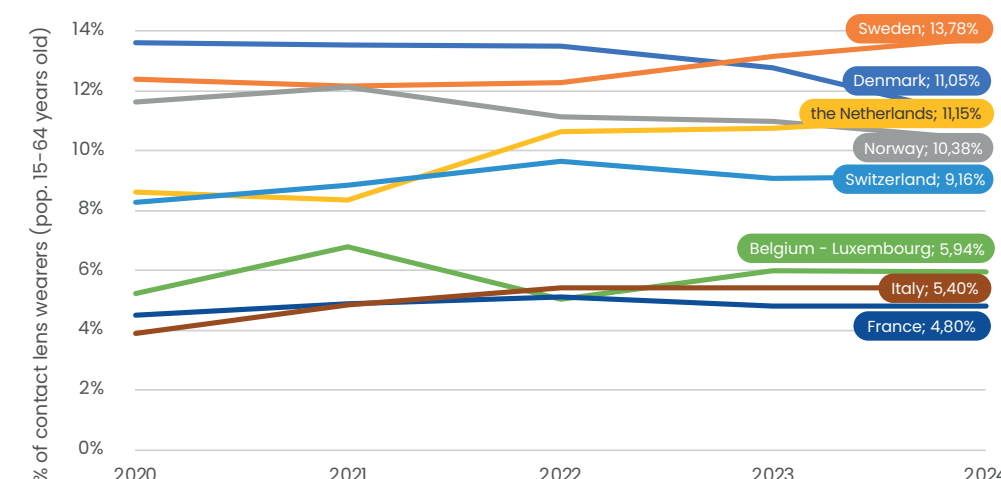
by Anne-Laure Martinet, Secretary General of EuromContact

Market trends & industry insights

The European contact lens market has demonstrated an overall growth over the past five years, with an average annual increase of 4.7% between 2020 and 2024. Following the sharp -9.1% decline in 2020 due to pandemic lockdowns, the market rebounded strongly with growth peaks of +10.8% in 2021 and +13.1% in 2022. Growth has since normalised, reaching +3.8% in 2023 and +5.9% in 2024. While robust, this recovery has been somewhat slower than in markets outside the EU, where average annual growth exceeds 6%, despite experiencing similar pandemic disruptions.

Regional dynamics remain distinct across Europe. The Nordic countries (Denmark, Sweden, Norway) as well as the Netherlands continue to lead in contact lens usage among people aged 15–64. Usage is still increasing in Sweden, while stabilising in Denmark and Norway. Southern and Central European countries such as Italy, Germany, and Spain, which began from lower usage levels, have shown upward trends. The UK & Ireland, Switzerland, Belgium & Luxembourg, and France have remained relatively stable over the past five years.

Evolution of contact lens wearers between 2020 and 2024



Looking ahead, the European contact lens market is expected to expand by approximately 3–3.5% annually in the coming years, driven by demographic trends (ageing populations), lifestyle factors (increased screen use, rising myopia prevalence), and continuous product innovation. As eye health and vision correction become even more critical in today's digital world, contact lenses are evolving to meet consumer demands for comfort, flexibility, and lifestyle enhancement.

The online share of contact lens sales surged in 2020 and continued to grow in 2021 across all markets (Europe, USA, Latin America, Asia-Pacific, Middle East and Africa). According to the 2024 Contact Lens Spectrum survey, practitioners estimate that 23% of their patients purchase lenses online, a figure stable since 2021.

Consumer behaviour & preferences

Looking at what is influencing the contact lens product and brand that people buy, wearers are driven heavily by the eyecare provider's recommendation and by lens comfort, both outweighing price considerations studies show. This pattern is consistent across both Europe and the US.

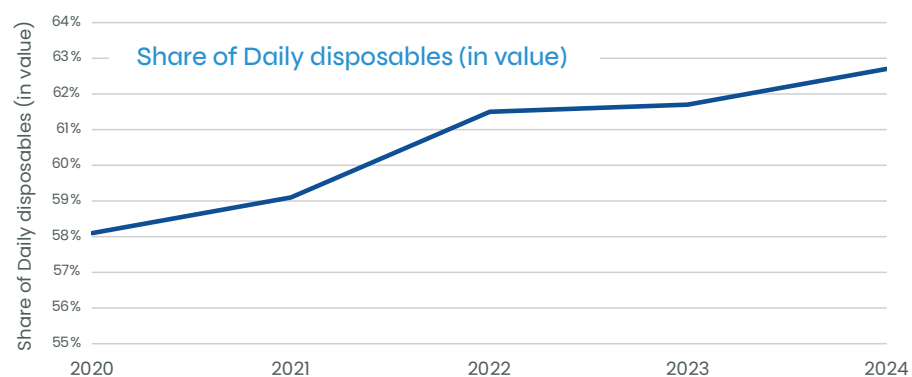
Loyalty in this sector remains high. Services that make the lives of contact lens patients more convenient, such as direct-to-patient delivery or subscription schemes, strengthen loyalty to both the practice and contact lens. After-sale care is highly valued: 83% of patients cite it as a factor influencing their choice of practice.

While e-commerce and digital tools increasingly shape the purchasing journey, the importance of physical retail and in-practice experiences remains critical. Across all age groups, professional advice and personalised service continue to be "paramount." Eye care providers are responding by integrating digital solutions alongside in-store services, ensuring they meet rising consumer expectations for digital convenience.

Innovation & technology

Since their origin in the late 19th century, contact lenses have undergone profound evolution. Today, innovation continues to drive major shifts in the contact lens market by improving comfort, health outcomes, and opening new functional applications. Key developments over the past two decades include:

- **Silicone hydrogel lenses**, enhancing oxygen permeability and enabling longer, healthier, and more comfortable wear
- **Daily disposables**, valued for hygiene and convenience



- **Myopia management with contact lenses**, increasingly adopted by practitioners to help slow the progression of pediatric myopia, ortho-k is considered the leading product for myopia management globally, alongside atropine.
- **Multifocal, toric, and multifocal toric lenses**, meeting growing demand for presbyopia correction and astigmatism management, reflecting aging demographics and more specialized vision correction needs.

Additionally, the demand for multifocal lenses for presbyopia and toric lenses for astigmatism continues to grow, aligned with ageing populations and more specialised vision correction needs.

Looking ahead, smart contact lenses, hold the potential to radically expand beyond traditional vision correction to multifunctional health and augmented reality applications. Current examples include photochromic lenses and lenses designed for continuous intraocular monitoring. Future developments are likely to feature diagnostic lenses, adaptive lenses and augmented lenses. Advances in material science, microelectronics, and biomedicine fuel this next wave of innovation.

Sustainability & corporate responsibility

The contact lens sector is actively advancing sustainability through:

- Recycling & waste reduction programmes, collecting used lenses and blister packs.
- Packaging improvements, moving toward lighter, recyclable formats.
- Manufacturing efficiencies, aimed at reducing water use and energy consumption across production sites.

Interest in sustainable purchasing is rising. In the UK, for example, 43% of consumers would consider buying sustainable contact lenses, with younger age groups showing especially strong interest². However, few actively discuss sustainability with their eye care professional.

Eye care professionals have a crucial role in bridging this gap. By advising patients on best practices, such as local recycling options and emphasising that lenses should never be flushed down sinks or toilets, they can help patients make more sustainable choices without compromising eye health.

² UK Optical Goods Retailing Market Report 2025, Mintel

ANNEX I: ECOO MEMBERS: NATIONAL PROFESSIONAL ASSOCIATIONS

Austria

- Austrian Optometric Association (AOA)
- Wirtschaftskammer Österreich, Bundesinnung Gesundheitsberufe (WKO)

Belgium

- Association Professionnelle des Opticiens et Optométristes de Belgique (APOOB)

Bulgaria

- Bulgarian Association of Optometrists (BAO)
- National Association of Bulgarian Optometrists and Opticians (NABOO)

Cyprus

- Association of Optometrists
- Cyprus Optical Association

Czech Republic

- Společenstvo českých optiků a optometristů z.s. (SCOO)

Denmark

- Dansk Selskab for Optometri (DSO)
- Optikerforeningen
- Serviceforbundet – Urmagerne og Optikerne

Estonia

- Estonian Optometrists Association

Finland

- Finnish Association of Vision and Eyecare Näe

France

- Fédération Nationale des Opticiens de France (FNOF)

Germany

- Vereinigung Deutscher Contactlinsen-Spezialisten und Optometristen e. V. (VDCO e. V.)
- Wissenschaftliche Vereinigung für Augenoptik und Optometrie (WVAO)
- Zentralverband der Augenoptiker und Optometristen (ZVA)

Greece

- Panhellenic Union of Opticians and Optometrists (PEOO)

Hungary

- Magyar Optikus és Optometrista Szövetség (MOOSZ)

Ireland

- Irish Association of Dispensing Opticians (IADO)
- Optometry Ireland
- The Association of Eye Care Providers of Ireland (FODO Ireland)

Italy

- Associazione Laureati Ottica e Optometria (ALOO)
- Federottica (Associazione Federativa Nazionale degli Ottici Optometristi italiani)
- Società Optometrica Italiana (SOptI)

Latvia

- Latvijas Optometristu un optiķu asociācija (LOOA)

Lithuania

- Lithuanian Association of Optometrists

Malta

- Malta Association of Optometrists (MAO)

Norway

- Norges Optikerforbund (NOF)
- Optikerbransjen

Poland

- Krajowa Rzemieslnicza Izba Optyczna (KRIO)
- Polskie Towarzystwo Optometrii i Optyki (PTOO)

Portugal

- Associação de Profissionais Licenciados de Optometria, Entidade de Utilidade Pública (APLO)
- Associação Nacional dos Ópticos (ANO)
- Uniao Profissional dos Opticos e Optometristas Portugueses (UPOOP)

Slovakia

- Optická únia Slovenska

Slovenia

- Društvo očesnih optikov Slovenije (DOOS)

Spain

- Consejo General de Colegios de Ópticos-Optometristas (C.G.C.O.O.)

Sweden

- Optikerförbundet
- Optikbranschen

Switzerland

- Der Verband für Optometrie und Optik - L'association d'optométrie et d'optique (OPTIKSCHWEIZ - OPTIQUESUISSE)
- Schweizerischer Berufsverband für Augenoptik und Optometrie - Société Suisse pour l'Optique et l'Optometrie (SBAO - SSOO)

The Netherlands

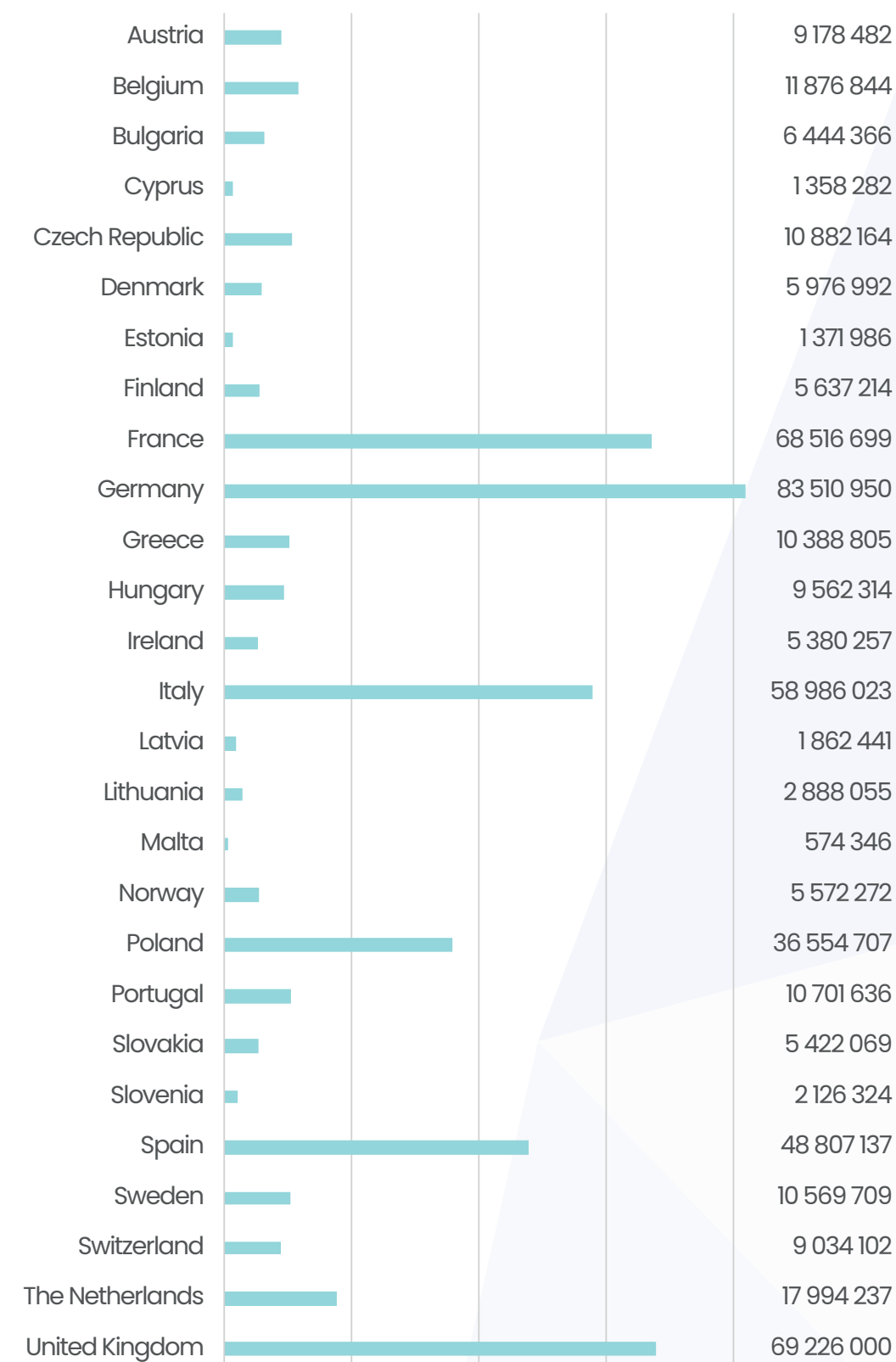
- Algemene Nederlandse Vereniging van Contactlensspecialisten (ANVC)
- Nederlandse Unie Van Optiekbedrijven (NUVO)
- Optometristen Vereniging Nederland (OVN)

United Kingdom

- Association of British Dispensing Opticians (ABDO)
- Association of Optometrists (AOP)
- FODO - the Association for Eye Care Providers
- The College of Optometrists

ANNEX II: REFERENCE POPULATION DATABASE

Country population: World Bank data 2024



Source: https://data.worldbank.org/indicator/SP.POP.TOTL?most_recent_year_desc=false (retrieved September 2025)


ANNEX III: PROFESSIONAL TITLES

The following table is designed to be a glossary of terminology used for the various professions. The professional title is given in the respective national language(s), followed by a translation into English.

PROFESSIONAL TITLES FOR Optics

	NATIVE	ENGLISH
 AT	Augenoptiker	Optician
 BE	Opticien	Optician
 BG	Оптик, техник по очна оптика, медицински оптик, техник по оптометрична техника и рефракционирание	Optician, optical technician, medical optician, technician in optometric technique and refraction
 CH	Diplomierte/r Augenoptiker/in Opticien diplômé / Opticienne diplômée Ottico diplomato / ottica diplomata	Qualified optician
 CY	Οπτικός	Optician
 CZ	Oční optik	Eye optician
 DE	Augenoptiker	Optician
 FR	Opticien-Lunetier	Optician
 GR	Οπτικός	Optician
 HU	Optikus / látyszerész	Optician
 IT	Ottico	Optician
 NL	Opticien	Optician
 SI	Očesni optik	Optician
 SK	Očný optik	Eye optician
 PT	Técnico de Óptica	Technician in optics

PROFESSIONAL TITLES FOR Dispensing Opticians

	NATIVE	ENGLISH
 CH	Augenoptiker/in EFZ (eidgenössisches Fähigkeitszeugnis) Opticien/ne CFC (certificat fédéral de capacité) Ottico/Ottica AFC (attestato federale di capacità)	Dispensing optician
 CY	Τεχνικός οπτικός	Dispensing optician / technician
 GR	Οπτικός Τεχνολόγος	Dispensing Optician
 IE	Dispensing optician	Dispensing optician
 UK	Dispensing optician	Dispensing optician

PROFESSIONAL TITLES FOR Contact Lens Specialist

	NATIVE	ENGLISH
 AT	Kontaktlinsenoptiker	Contact lens optician
 CY	Ειδικός φακών επαφής	Specialist contact lens fitter
 HU	Kontaktológus	Contactologist - it is included in optometry profession
 IE	Dispensing optician with contact lens speciality	Specialist contact lens fitter
 NL	Contactlensspecialist	Contact lens specialist
 UK	Contact lens optician	Contact lens optician

PROFESSIONAL TITLES FOR Optometry

	NATIVE	ENGLISH
 AT	Augenoptikermeister/optometrist	Optometrist
 BE	Optometrist	Optometrist
 BG	Оптометрист	Optometrist
 CH	Optometrist/in B.Sc. Optométriste B.Sc. Optometrista B.Sc.	Optometrist
 CY	Οπτομέτρης	Optometrist
 CZ	Optometrista	Optometrist
 DE	Augenoptikermeister	Optometrist
 DK	Optometrist	Optometrist
 EE	Optometrist	Optometrist
 ES	Óptico-optometrista	Optician-optometrist
 FI	Optikko	Optometrist
 GR	Οπτικός Οπτομέτρης	Optician-optometrist
 HU	Optometrista	Optometrist
 IE	Optometrist (radharcmhastoir in Irish)	Optometrist (aka optician)
 IT	Ottico optometrista	Optometrist
 LT	Optometrininkas	Optometrist
 LV	Optometrists	Optometrist
 MT	Optometrista	Optometrist
 NL	Optometrist	Optometrist
 NO	Optiker	Optometrist
 PL	Optometrysta	Optometrist
 PT	Optometrista	Optometrist
 SE	Optiker	Optometrist
 SI	Optometrist	Optometrist
 SK	Optometrista	Optometrist
 UK	Optometrist	Optometrist

Acknowledgements

ECOO thanks all its member and partners for providing the data for the Blue Book as well as the Executive Committee for their support. Special thanks to Gabriëlle Janssen, Prof Julie-Anne Little, Dr Cindy Tromans, Peter Gumpelmayer and Elaine Grisdale for their invaluable support on developing the questionnaire and engaging with members on the quality control.

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About ECOO:

The European Council of Optometry and Optics (ECOO) is the European organisation which represents the interests of optometrists and opticians from 27 countries. It aims to promote eye health to the public across borders and to harmonise clinical and educational standards of optometric and optical practice throughout Europe.

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