CED Survey Results – Clear aligners, intraoral scanners, digital workflows

Replies received: 18

Countries: Cyprus, Austria, Latvia, Ireland, Finland, Slovakia, Italy, Czech Republic, Malta, Greece, Poland, The Netherlands, Belgium (Flemish members), Hungary, France, Switzerland, Spain, Iceland.

Q: Based on your association's knowledge and any feedback from your members, how important are digital workflows, including intraoral scanning and digital ordering, to dental practices in your country?

Country	Based on your association's knowledge and any feedback from your members, how important are digital workflows, including intraoral scanning and digital ordering, to dental practices in your country?
Czech Republic	Very important
France	Essential
Hungary	Very important
Malta	Essential
Slovakia	Very important
Italy	Somewhat important
Austria	Very important
Finland	Somewhat important
Greece	Somewhat important

Netherlands	Essential
Latvia	Very important
Switzerland	Somewhat important
Ireland	Essential
Cyprus	Very important
Belgium (VVT)	Very important
Poland	An increasing number of dental laboratories require scans to manufacture templates or orthodontic appliances.
Spain	Very important
Iceland	Essential

Graph representation:

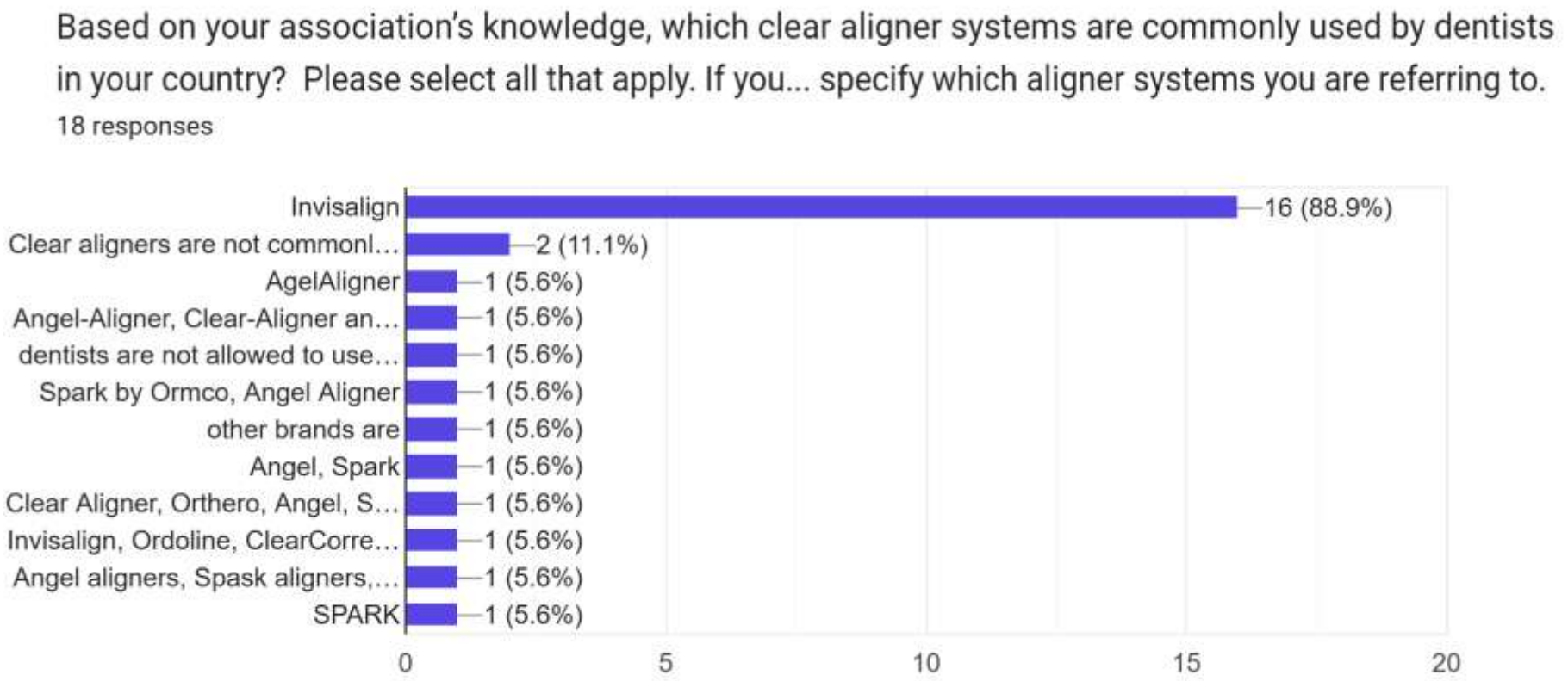


Q: Based on your association's knowledge, which clear aligner systems are commonly used by dentists in your country?

Association and country of the respondent	Based on your association's knowledge, which clear aligner systems are commonly used by dentists in your country? Please select all that apply. If you choose Other, please feel free to specify which aligner systems you are referring to.
Czech Republic	Invisalign
France	Invisalign
Hungary	Invisalign, Clear aligners are not commonly used
Malta	Invisalign
Slovakia	Invisalign, Spark by Ormco, Angel Aligner
Italy	Invisalign, other brands are
Austria	Invisalign, Angel-Aligner, Clear-Aligner and others
Finland	Invisalign
Greece	Invisalign, Angel, Spark
Netherlands	Invisalign, Ordoline, ClearCorrect (orthodontist also use SureSmile, Spark, Angel aligners
Latvia	dentists are not allowed to use comprehensive aligner systems, only orthodontists can
Switzerland	Invisalign
Ireland	Invisalign
Cyprus	Invisalign, Clear aligners are not commonly used, AgelAligner
Belgium (VVT)	Invisalign, Angel aligners, Spask aligners, Clear Correct aligners, ...
Poland	Invisalign, Clear Aligner, Orthero, Angel, Spark
Spain	Invisalign, SPARK

Iceland	Invisalign

Graph representation:

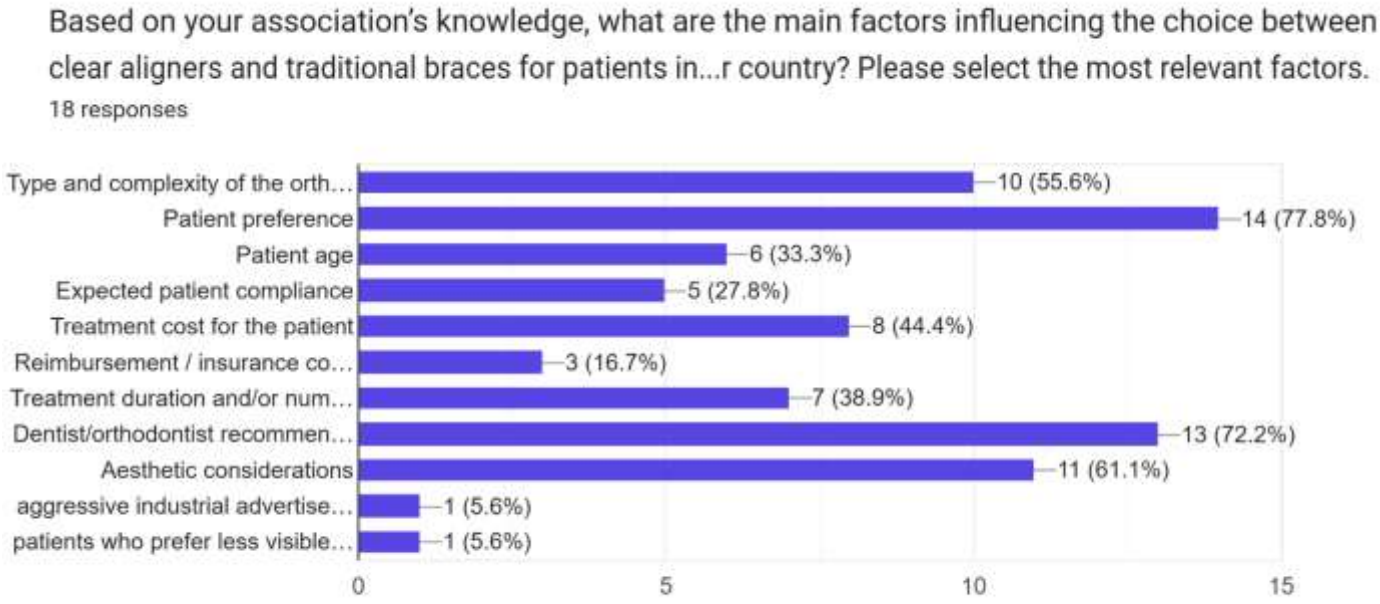


Q: Based on your association's knowledge, what are the main factors influencing the choice between clear aligners and traditional braces for patients in your country?

Please select the most relevant factors

Association and country of the respondent	Based on your association's knowledge, what are the main factors influencing the choice between clear aligners and traditional braces for patients in your country? Please select the most relevant factors.
Czech Republic	Dentist/orthodontist recommendation
France	Type and complexity of the orthodontic case, Expected patient compliance, Treatment cost for the patient
Hungary	Patient preference, Expected patient compliance, Treatment cost for the patient, Reimbursement / insurance coverage, Dentist/orthodontist recommendation, Aesthetic considerations
Malta	Patient preference, Dentist/orthodontist recommendation
Slovakia	Type and complexity of the orthodontic case, Patient preference, Treatment cost for the patient, Reimbursement / insurance coverage, Dentist/orthodontist recommendation
Italy	Type and complexity of the orthodontic case, Patient preference, Dentist/orthodontist recommendation
Austria	Patient preference, Dentist/orthodontist recommendation, Aesthetic considerations, aggressive industrial advertisement
Finland	Type and complexity of the orthodontic case, Patient preference, Patient age, Treatment cost for the patient, Treatment duration and/or number of appointments, Aesthetic considerations
Greece	Type and complexity of the orthodontic case, Patient preference, Patient age, Treatment cost for the patient, Dentist/orthodontist recommendation, Aesthetic considerations
Netherlands	patients who prefer less visible treatment option, it is up to the dentist/orthodontist to inform about limitations of one tx modality over another
Latvia	Type and complexity of the orthodontic case, Patient age, Expected patient compliance, Treatment cost for the patient, Treatment duration and/or number of appointments, Dentist/orthodontist recommendation, Aesthetic considerations
Switzerland	Patient preference
Ireland	Type and complexity of the orthodontic case, Patient preference, Treatment duration and/or number of appointments, Dentist/orthodontist recommendation, Aesthetic considerations
Cyprus	Patient preference, Patient age, Expected patient compliance, Treatment duration and/or number of appointments, Dentist/orthodontist recommendation, Aesthetic considerations

Belgium (VVT)	Type and complexity of the orthodontic case, Patient preference, Expected patient compliance, Treatment duration and/or number of appointments, Aesthetic considerations
Poland	Type and complexity of the orthodontic case, Patient preference, Treatment duration and/or number of appointments, Dentist/orthodontist recommendation, Aesthetic considerations
Spain	Patient preference, Patient age, Treatment cost for the patient, Dentist/orthodontist recommendation, Aesthetic considerations
Iceland	Type and complexity of the orthodontic case, Patient preference, Patient age, Treatment cost for the patient, Reimbursement / insurance coverage, Treatment duration and/or number of appointments, Dentist/orthodontist recommendation, Aesthetic considerations



'=> In relation to the question above, if possible, please indicate whether you are aware of significant differences between adults and teenagers, or changes in these factors over recent years, especially since 2016:

Country	Reply
Czech Republic	no difference
France	Since 2016, the aligner system has evolved a lot, allowing for wider coverage in children and teenagers.
Hungary	We are not aware of significant differences between adults and teenagers regarding the adoption of digital workflows in Hungarian dental practices. The use of intraoral scanning and digital ordering is primarily determined by the technological capabilities of the dental practice, the type of treatment provided and the financial resources available, rather than the patient's age. However, digital technologies may be particularly relevant in orthodontics, where teenage patients represent a substantial proportion of the patient population. Intraoral scanning and digital treatment planning can improve patient comfort and facilitate communication with patients and their parents. Since 2016, the adoption of digital dentistry in Hungary has increased considerably, particularly in private practices. Intraoral scanners, CAD/CAM systems and digital communication with dental laboratories have become increasingly common. Nevertheless, significant disparities remain between private and publicly funded dental services, mainly due to financial constraints. Our organization does not currently have comprehensive statistical data quantifying these differences or changes over time.
Malta	Both age groups prefer aligners
Slovakia	Adults tend to prefer aligners to traditional braces, mainly because the aesthetic apearance. The costs are not very different as adult orthodontic treatment is not reimbursed by insurance companies in Slovakia. At the other hand, the orthodontic treatment at teenager is reimbursed partialy but only in case of fixed braces and other removable appliances. If the parent opt for aligners, the treatment has to be paid out of the pocket. It is a factor influencing choice of treatment in children and teenagers.
Italy	Generally speaking, adults seem more wary and skeptical about aligners efficacy. However, social and economic factors are also to take under consideration.
Austria	there is no insurance coverage for aligners in teenagers in Austria!
Finland	
Greece	Increased interest over time
Netherlands	adolescents and teenagers are mostly treated with fixed appliance to correct misalignment of teeth, but compared to 2016 a small percentage of teenagers now prefer aligners.
Latvia	yes
Switzerland	adult patients prefer aligner

Ireland	There is increased patient demand especially among adults
Cyprus	Yes
Belgium (VVT)	Reenagers are not always compliant, adults p^refare aligners because of aesthetic reasons
Poland	
Spain	Increase in the use of aligners among adults. Among teenagers, the take-up rate is approximately 50 per cent
Iceland	Adults appear to be an increasingly important patient group for clear aligner treatment, while teenagers are more commonly treated within traditional orthodontic workflows

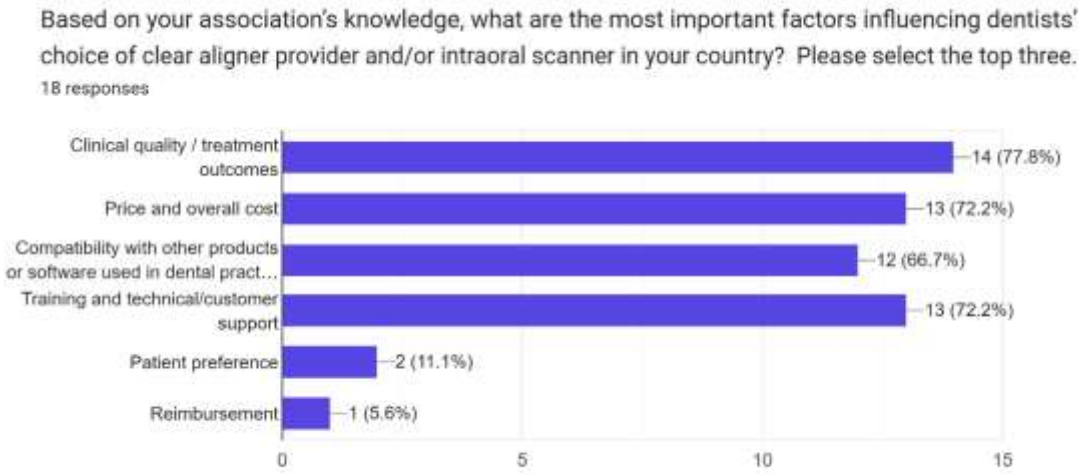
Q: Based on your association's knowledge, what are the most important factors influencing dentists' choice of clear aligner provider and/or intraoral scanner in your country?

Please select the top three.

Country	Based on your association's knowledge, what are the most important factors influencing dentists' choice of clear aligner provider and/or intraoral scanner in your country? Please select the top three.
Czech Republic	Price and overall cost, Training and technical/customer support, Patient preference
France	Price and overall cost, Compatibility with other products or software used in dental practices
Hungary	Clinical quality / treatment outcomes, Price and overall cost, Compatibility with other products or software used in dental practices, Training and technical/customer support
Malta	Price and overall cost, Training and technical/customer support
Slovakia	Clinical quality / treatment outcomes, Price and overall cost, Training and technical/customer support
Italy	Clinical quality / treatment outcomes, Price and overall cost, Compatibility with other products or software used in dental practices
Austria	Clinical quality / treatment outcomes, Price and overall cost, Training and technical/customer support
Finland	Clinical quality / treatment outcomes, Price and overall cost, Compatibility with other products or software used in dental practices, Training and technical/customer support

Greece	Clinical quality / treatment outcomes, Price and overall cost, Compatibility with other products or software used in dental practices
Netherlands	Clinical quality / treatment outcomes, Price and overall cost, Compatibility with other products or software used in dental practices
Latvia	Clinical quality / treatment outcomes, Price and overall cost, Compatibility with other products or software used in dental practices, Training and technical/customer support
Switzerland	Patient preference
Ireland	Clinical quality / treatment outcomes, Training and technical/customer support
Cyprus	Clinical quality / treatment outcomes, Price and overall cost, Compatibility with other products or software used in dental practices, Training and technical/customer support, Reimbursement
Belgium (VVT)	Clinical quality / treatment outcomes, Compatibility with other products or software used in dental practices, Training and technical/customer support
Poland	Clinical quality / treatment outcomes, Compatibility with other products or software used in dental practices, Training and technical/customer support
Spain	Clinical quality / treatment outcomes, Compatibility with other products or software used in dental practices, Training and technical/customer support
Iceland	Clinical quality / treatment outcomes, Price and overall cost, Compatibility with other products or software used in dental practices, Training and technical/customer support

Graph representation:



Q: Based on your association's knowledge, do dental professionals offering clear aligners in your country typically offer more than one clear aligner brand?

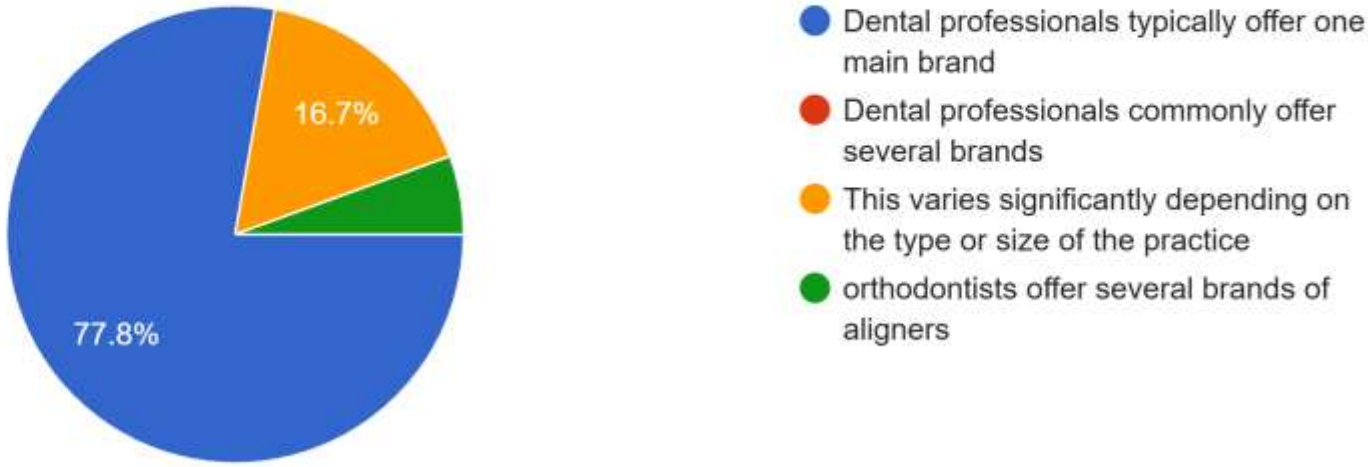
Association and country of the respondent	Based on your association's knowledge, do dental professionals offering clear aligners in your country typically offer more than one clear aligner brand?
Czech Republic	Dental professionals typically offer one main brand
France	Dental professionals typically offer one main brand
Hungary	This varies significantly depending on the type or size of the practice
Malta	Dental professionals typically offer one main brand
Slovakia	This varies significantly depending on the type or size of the practice
Italy	Dental professionals typically offer one main brand
Austria	Dental professionals typically offer one main brand

Finland	Dental professionals typically offer one main brand
Greece	Dental professionals typically offer one main brand
Netherlands	Dental professionals typically offer one main brand
Latvia	orthodontists offer several brands of aligners
Switzerland	Dental professionals typically offer one main brand
Ireland	Dental professionals typically offer one main brand
Cyprus	Dental professionals typically offer one main brand
Belgium (VVT)	This varies significantly depending on the type or size of the practice
Poland	Dental professionals typically offer one main brand
Spain	Dental professionals typically offer one main brand
Iceland	Dental professionals typically offer one main brand

Graph representation:

Based on your association's knowledge, do dental professionals offering clear aligners in your country typically offer more than one clear aligner brand?

18 responses



=> In relation to the question above, if you are aware of barriers to switching suppliers, please indicate the most relevant ones (e.g. training/familiarity, scanner or software integration, commercial arrangements, brand recognition/patient demand, clinical considerations or switching costs):

Country	'=> In relation to the question above, if you are aware of barriers to switching suppliers, please indicate the most relevant ones (e.g. training/familiarity, scanner or software integration, commercial arrangements, brand recognition/patient demand, clin
Czech Republic	it up to orthodontist
France	The trade agreements made with Align and the practitioner are constraints for changing suppliers. Every year, the practitioner commits to completing a certain number of cases and ends up locked in by a significant financial loss if they consider changing suppliers.

Hungary	Based on our association's knowledge and feedback from dental professionals, several barriers may discourage Hungarian dental practices from switching suppliers of intraoral scanners, digital software or related services. The most relevant barriers include: Training and familiarity: Dental professionals invest considerable time in learning specific digital systems. Switching suppliers may require additional training and temporarily disrupt established clinical workflows. Scanner and software integration: Compatibility between intraoral scanners, CAD/CAM software and dental laboratory systems is a major consideration. Proprietary file formats and closed digital ecosystems may restrict interoperability and create dependence on particular suppliers. Switching costs: The substantial initial investment in digital equipment, software licences, maintenance and technical support can make switching suppliers financially unattractive, particularly for smaller practices. Clinical considerations: Dentists prioritise accuracy, reliability, ease of use and continuity of care. Changing suppliers may require adjustments to established clinical protocols and laboratory partnerships. Commercial arrangements and technical support: Existing service contracts, warranties, subscription models and access to reliable local technical support can influence purchasing decisions. Brand recognition and patient demand appear to be less significant factors than technical compatibility, clinical reliability and cost. In Hungary, financial considerations are particularly relevant given the substantial differences in investment capacity between private and publicly funded dental practices.
Malta	Training / Familiarity
Slovakia	clinical training and experience, software integration, brand recognition, paralell use of two or more systems can be confusing
Italy	Costs. Aligner firms lower the price of the MDs by number of patients; sharing the cases on multiple brands is often conterproductive. This can lead to unhealthy market practices, with dental chains grouping hundreds of cases (impossible to reach for dental clinics) and obtaining high discounts.
Austria	scanner and software integration, commercial arrangements
Finland	
Greece	scanner integration, compatibility of scanner with aligner provider. Software iTero limits loyality- discount program

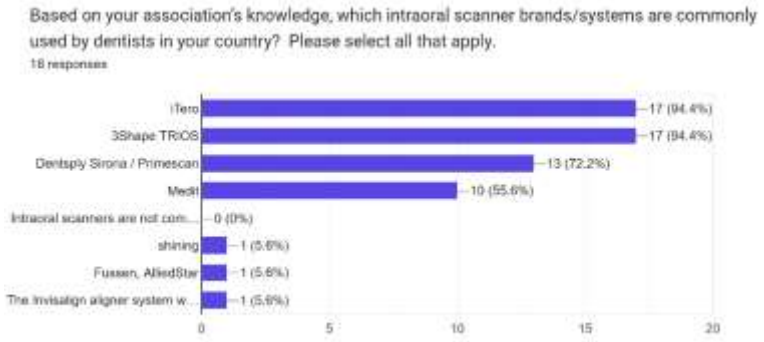
Netherlands	iTero scanner is required for direct uploading into the cloud software of Invisalign
Latvia	clinical considerations and costs
Switzerland	familiarity, scanner and software integration
Ireland	
Cyprus	No
Belgium (VVT)	When a practician is familiar to one system, he or she doesn't want to change easily. Not all scanners are compatible to every system
Poland	
Spain	Switching costs, software integration...
Iceland	The main barrier is scanner and software integration with existing digital workflows

Q: Based on your association's knowledge, which intraoral scanner brands/systems are commonly used by dentists in your country?

Country	Based on your association's knowledge, which intraoral scanner brands/systems are commonly used by dentists in your country? Please select all that apply.
Czech Republic	iTero, 3Shape TRIOS
France	iTero, 3Shape TRIOS
Hungary	iTero, 3Shape TRIOS, Dentsply Sirona / Primescan, Medit
Malta	iTero, 3Shape TRIOS, Dentsply Sirona / Primescan, Medit
Slovakia	iTero, 3Shape TRIOS, Dentsply Sirona / Primescan
Italy	iTero, Dentsply Sirona / Primescan
Austria	iTero, 3Shape TRIOS, Dentsply Sirona / Primescan, Medit, shining

Finland	iTero, 3Shape TRIOS, Dentsply Sirona / Primescan, Medit
Greece	iTero, 3Shape TRIOS, Dentsply Sirona / Primescan, Medit, Fussen, AlliedStar
Netherlands	iTero, 3Shape TRIOS
Latvia	iTero, 3Shape TRIOS, Dentsply Sirona / Primescan
Switzerland	3Shape TRIOS, Dentsply Sirona / Primescan
Ireland	iTero, 3Shape TRIOS, Dentsply Sirona / Primescan, Medit
Cyprus	iTero, 3Shape TRIOS, Dentsply Sirona / Primescan, Medit
Belgium (VVT)	iTero, 3Shape TRIOS, Medit
Poland	iTero, 3Shape TRIOS, The Invisalign aligner system works exclusively with iTero.
Spain	iTero, 3Shape TRIOS, Dentsply Sirona / Primescan, Medit
Iceland	iTero, 3Shape TRIOS, Dentsply Sirona / Primescan, Medit

Graph representation:

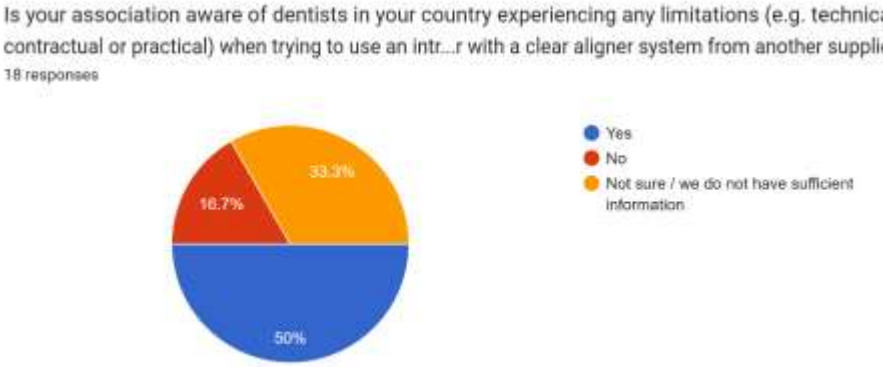


Q: Is your association aware of dentists in your country experiencing any limitations (e.g. technical, contractual or practical) when trying to use an intraoral scanner from one supplier with a clear aligner system from another supplier?

Country	Is your association aware of dentists in your country experiencing any limitations (e.g. technical, contractual or practical) when trying to use an intraoral scanner from one supplier with a clear aligner system from another supplier?
Czech Republic	No
France	Yes
Hungary	No
Malta	Yes
Slovakia	Not sure / we do not have sufficient information
Italy	Yes
Austria	Yes
Finland	Not sure / we do not have sufficient information
Greece	Yes
Netherlands	Yes
Latvia	Not sure / we do not have sufficient information
Switzerland	Not sure / we do not have sufficient information
Ireland	Not sure / we do not have sufficient information
Cyprus	No
Belgium (VVT)	Yes

Poland	Not sure / we do not have sufficient information
Spain	Yes
Iceland	Yes

Graph representation:



'=> If yes to the above question, please briefly describe the limitations or experiences reported by your members, where possible:

Country	=> If yes to the above question, please briefly describe the limitations or experiences reported by your members, where possible:
Czech Republic	
France	The STL file operating system isn't open. There's no possible gateway with all the companies offering aligners.
Hungary	
Malta	Invisalign is only compatible with iTero

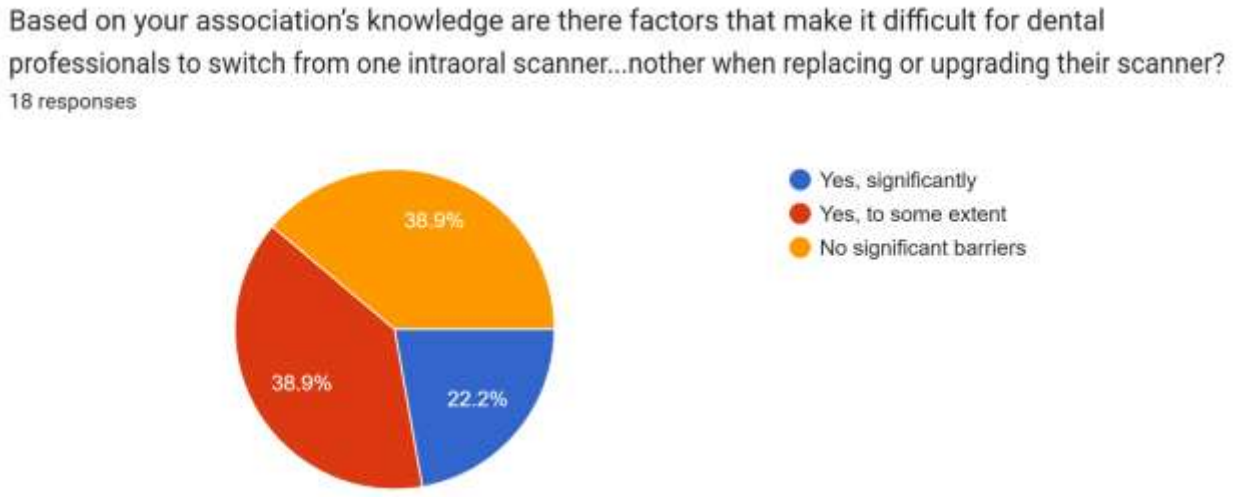
Slovakia	
Italy	softwares are often ebmedded in the scanner and calibrated to the specific aligner to be produces.
Austria	Align Tech. doesn't (didn´t?) accept other scanners than iTero respectively newer models of formerly accepted ones of special brands (e.g. 3shape)
Finland	
Greece	It is not possible to use the Invisalign system with any other scanner except for iTero.
Netherlands	see before
Latvia	
Switzerland	
Ireland	Medit appears to have the most open workflow
Cyprus	
Belgium (VVT)	Example: Medit is not compatible with Invisalign and there is only one type of 3Hape Trios (Trios3) compatible with Invisalign
Poland	
Spain	There are aligner brands that require you to use specific intraoral scanners.
Iceland	Members have mainly reported limitations related to scanner and software compatibility when switching between different systems. If a clear aligner product does not support the scanner used by the dentist, this may influence the dentist's choice of provider, and they may consider switching to an alternative clear aligner system

Q: Based on your association's knowledge are there factors that make it difficult for dental professionals to switch from one intraoral scanner brand to another when replacing or upgrading their scanner?

Country	Based on your association's knowledge are there factors that make it difficult for dental professionals to switch from one intraoral scanner brand to another when replacing or upgrading their scanner?
Czech Republic	No significant barriers

France	Yes, significantly
Hungary	Yes, to some extent
Malta	No significant barriers
Slovakia	No significant barriers
Italy	Yes, to some extent
Austria	Yes, significantly
Finland	Yes, to some extent
Greece	Yes, significantly
Netherlands	Yes, to some extent
Latvia	No significant barriers
Switzerland	No significant barriers
Ireland	Yes, to some extent
Cyprus	No significant barriers
Belgium (VVT)	No significant barriers
Poland	Yes, significantly
Spain	Yes, to some extent
Iceland	Yes, to some extent

Graph representation:



=> If yes to the question above, what are the main factors? Please consider, where relevant, purchase/replacement cost, training, integration with existing software/workflows, compatibility with clear aligner providers or laboratories, existing data/patient records, and brand preference:

Country	'=> If yes to the question above, what are the main factors? Please consider, where relevant, purchase/replacement cost, training, integration with existing software/workflows, compatibility with clear aligner providers or laboratories, existing data/pati
Czech Republic	
France	The main obstacle remains the cost of changing equipment. When the practitioner buys an Itero scanner, they pay for the equipment and then are hit with a hefty monthly fee (€360 including tax/month) with no time limit. Plus, access to the STL files will be impossible after changing the scanner.
Hungary	Yes. Several factors can make it difficult for Hungarian dental professionals to switch between intraoral scanner brands when replacing or upgrading their equipment. The main barriers are:

	Purchase and replacement costs: The high cost of purchasing a new scanner, together with software licences, subscriptions and maintenance, represents a significant financial barrier, particularly for smaller practices and publicly funded dental services. Training and familiarity: Dental professionals and their staff become accustomed to specific scanning systems. Switching brands requires additional training and adaptation to new clinical workflows, potentially reducing efficiency during the transition. Software integration and interoperability: Existing CAD/CAM software, digital treatment planning systems and established workflows may not be fully compatible with scanners from other manufacturers. Closed digital ecosystems and proprietary file formats can create considerable dependence on a particular brand. Compatibility with laboratories and clear aligner providers: Established relationships with dental laboratories and orthodontic aligner manufacturers may influence scanner selection. Some providers accept data only from specific scanners or require additional software, subscriptions or conversion procedures. Existing patient records and digital data: Transferring historical scans, treatment plans and patient records between different systems can be technically challenging, particularly when data are stored in proprietary formats. Brand preference and technical support: Previous clinical experience, perceived reliability, established professional relationships and the availability of local technical support can encourage practitioners to remain with their existing supplier. In Hungary, purchase costs and compatibility with existing digital workflows are likely to be particularly important barriers. The availability of reliable local technical support and established relationships with dental laboratories also play an important role. Our association does not currently have quantitative data allowing us to rank these barriers according to their relative importance.
Malta	
Slovakia	
Italy	training can be managed; one of the main point the the possibility to export data of the previous software in the new one.
Austria	scans from other brands were not accepted
Finland	
Greece	The only scanner compatible with Invisalign is the iTero scanner. Other scanners are not accepted, nor are files exported from other scanners (STL, PLY, OBJ).
Netherlands	: integration with existing software for treatment planning

Latvia	
Switzerland	difficulties consist in new training that can be required, workflows and existing data and patients records
Ireland	integration with existing software/workflows
Cyprus	
Belgium (VVT)	
Poland	It is not possible to send a different scan to Invisalign. Alternatively, a model could be sent, but this is not recommended.
Spain	purchase/replacement cost, training, integration with existing software/workflows, compatibility with clear aligner providers or laboratories, existing data/patient records, and brand preference
Iceland	The main factors are integration with existing software and workflows, compatibility with clear aligner providers, and the cost of purchasing or replacing the scanner. Dentists using newer 3Shape scanner models tend to choose alternatives to Invisalign, while some dentists using 3Shape 3 or older models, or iTero scanners, choose Invisalign.

Q: Based on your association's knowledge, how do dental professionals in your country typically submit intraoral scans when ordering clear aligners?

Country	Based on your association's knowledge, how do dental professionals in your country typically submit intraoral scans when ordering clear aligners?
Czech Republic	Mainly through an automated/direct integration between the intraoral scanner and clear aligner platform
France	Both methods are commonly used
Hungary	Both methods are commonly used
Malta	This varies significantly depending on the scanner and/or clear aligner provider
Slovakia	Mainly through an automated/direct integration between the intraoral scanner and clear aligner platform
Italy	Both methods are commonly used
Austria	Mainly through an automated/direct integration between the intraoral scanner and clear aligner platform

Finland	Both methods are commonly used
Greece	This varies significantly depending on the scanner and/or clear aligner provider
Netherlands	Mainly through an automated/direct integration between the intraoral scanner and clear aligner platform
Latvia	Mainly by manually exporting and uploading scan files (e.g. STL files)
Switzerland	Mainly through an automated/direct integration between the intraoral scanner and clear aligner platform
Ireland	Mainly through an automated/direct integration between the intraoral scanner and clear aligner platform
Cyprus	Both methods are commonly used
Belgium (VVT)	Mainly through an automated/direct integration between the intraoral scanner and clear aligner platform
Poland	Mainly through an automated/direct integration between the intraoral scanner and clear aligner platform
Spain	Both methods are commonly used
Iceland	Mainly through an automated/direct integration between the intraoral scanner and clear aligner platform

Graph representation:



=> In relation to the question above, where manual file export/upload is used, is your association aware of any practical disadvantages compared with a directly integrated workflow (e.g. additional time, complexity or risk of errors)? Please briefly explain:

Country	'=> In relation to the question above, where manual file export/upload is used, is your association aware of any practical disadvantages compared with a directly integrated workflow (e.g. additional time, complexity or risk of errors)? Please briefly explain
Czech Republic	
France	When there isn't an automatic STL file transfer gateway, the practitioner has to do the process themselves, which can lead to file errors and takes a lot of time.
Hungary	
Malta	Time involved due to extra steps
Slovakia	more complicated, more time consuming
Italy	manual export can be used for delayed procedures. Moreover, not all dental scans are produced to produce an orthodontic appliance; scanners are increasingly used as a clinical tool

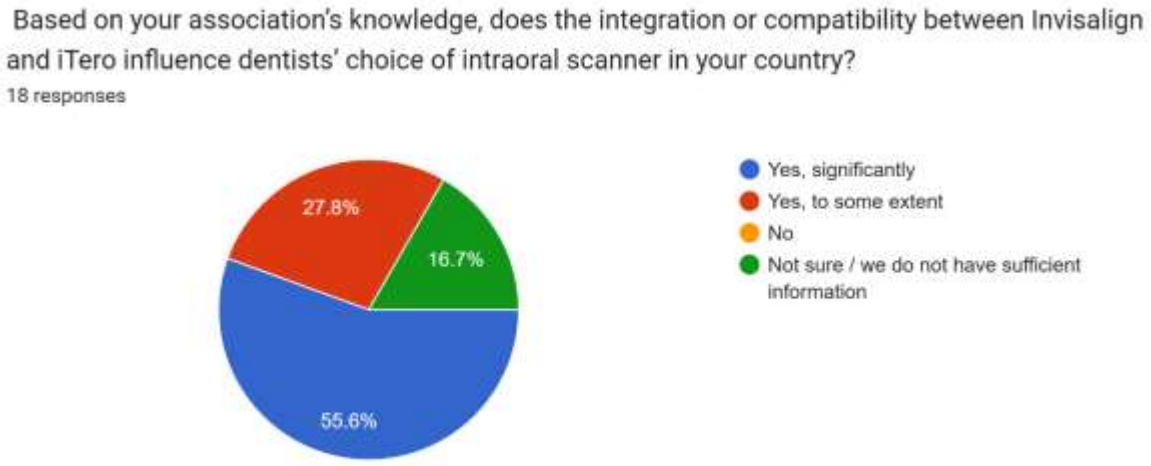
Austria	
Finland	
Greece	Additional time and complexity for exporting the files and manually uploading them. This also increases risk of errors, in uploading the wrong file.
Netherlands	additional time and so cost, possible error in submitting the incorrect file
Latvia	Not aware
Switzerland	
Ireland	
Cyprus	additional time, complexity, risk of errors
Belgium (VVT)	The only disadvantage is the additional time
Poland	
Spain	There are no significant drawbacks, apart from the extra time involved
Iceland	

Based on your association's knowledge, does the integration or compatibility between Invisalign and iTero influence dentists' choice of intraoral scanner in your country?

Country	Based on your association's knowledge, does the integration or compatibility between Invisalign and iTero influence dentists' choice of intraoral scanner in your country?
Czech Republic	Yes, significantly
France	Yes, significantly
Hungary	Not sure / we do not have sufficient information

Malta	Yes, significantly
Slovakia	Yes, significantly
Italy	Yes, to some extent
Austria	Yes, significantly
Finland	Not sure / we do not have sufficient information
Greece	Yes, significantly
Netherlands	Yes, significantly
Latvia	Not sure / we do not have sufficient information
Switzerland	Yes, to some extent
Ireland	Yes, to some extent
Cyprus	Yes, significantly
Belgium (VVT)	Yes, to some extent
Poland	Yes, significantly
Spain	Yes, significantly
Iceland	Yes, to some extent

Graph representation:



=> If possible, in relation to the question above, please briefly explain how this integration or compatibility has affected purchasing or usage decisions among dentists in your country:

Country	'=> If possible, in relation to the question above, please briefly explain how this integration or compatibility has affected purchasing or usage decisions among dentists in your country:
Czech Republic	
France	It seemed simpler for the practitioner to have a scanner with automatic sending of STL files to the aligner provider. This system locks the practitioner's ability to consider changing providers. Nowadays, ITERO scanners are unsellable because of this gateway lock and the monthly 'maintenance' cost.
Hungary	
Malta	If intending to offer Invisalign then iTero must be purchased
Slovakia	it is the easiest way to order aligners, quickest, least errors
Italy	
Austria	if you want to buy a scanner of a different brand, you have to choose another aligner company

Finland	
Greece	Since Invisalign only accepts iTero integration and does not accept other scanners, or even open format files (e.g. STL, OBJ, PLY), dentists feel that they have no choice but purchase the iTero scanner, even though the cost may be significantly higher. If the dentist cannot afford the high cost, they may defer purchasing, thus remain behind in using this technology and providing such service to their patients.
Netherlands	Yes significantly, since Invisalign was the first brand in our country to offer aligners and they also offered their iTero scanner. For more recently starting dentists/orthodontist this influence is far less evident to my opinion, they en-ter the aligner market in a more diversified stage
Latvia	not sure
Switzerland	general dentists tend to use open systems lie 3 Shape scanners, specialist orthodontists tend to use iTero
Ireland	
Cyprus	
Belgium (VVT)	I don't think that the scanner dictates the system but when someone likes to work with one system, he or she chooses the most efficient way to scan and the scanner which is most compatible with the system
Poland	To work with Invisalign aligners, one must complete company training, obtain certification, and possess an iTero scanner. Scans from the iTero scanner can only be sent to dental laboratories approved by Invisalign.
Spain	Sometimes dentists opt for a different brand of aligners to avoid having to buy an Itero, when they already have another one
Iceland	In some cases, dentists have responded to compatibility limitations by maintaining two different scanner systems. For example, if Invisalign does not support the scanner they already use, dentists may purchase an additional scanner or choose a different clear aligner provide

Q: Has your association/chamber been contacted directly by the European Commission in relation to this matter?

Country	Has your association/chamber been contacted directly by the European Commission in relation to this matter?
Czech Republic	No

France	Yes
Hungary	No
Malta	No
Slovakia	No
Italy	Yes
Austria	No
Finland	No
Greece	No
Netherlands	No
Latvia	No
Switzerland	No
Ireland	Do not know
Cyprus	No
Belgium (VVT)	No
Poland	No
Spain	Yes
Iceland	No

Other comments:

Country	Any additional comments:
Greece	Invisalign has a very good system for designing treatment with aligners and their product is innovative and of very high quality. This is a significant factor in choosing this system over the competitors. However, Invisalign is limited to the iTero scanner. The dentist, in trying to provide the best treatment to their patient, feels forced to acquire this specific scanner, since nothing else, not even open format files, are accepted by Invisalign. It should be noted that the iTero scanner is one of the most (if not the most) expensive scanners on the market. There is currently no evidence that other scanners produce results that are sub-optimal for construction of aligners. This is also evident from the successful implementation of aligner treatment by several other companies that produce aligners and scanners.
Netherlands	by Sander Brons - Orthodontist & practice owner: Founder of Orthodontie Merwestein in Nieuwegein. - Dutch Association of Orthodontists (NVvO): Board member / (vice-)chair of the NVvO. - KNMT involvement: Collaborates with the Royal Dutch Dental Association (KNMT) on orthodontic policy and cost-related research, including issues around medically necessary orthodontic care.
Poland	Invisalign is highly active on the Polish market. It is reported that it encourages young dentists — who are not specialists in orthodontics — to use its aligners by offering promotional training at low prices. The company employs a point-based system where reaching a certain level reduces the cost of purchasing the aligners. It is also reported that it operates actively within corporate healthcare networks (so called corporate dentistry) - lower cost for the provider generating higher profits.