



Overview of the Drone industry in Estonia

Use:

Drones usage in Estonia is rapidly increasing. Some private companies and public utilities companies start to see the new potential that drones applications have to offer. Infrastructure inspections were at start the main private industrial activities to recall, whereas for the local public governmental authorities uses, surveillance and border controls have been of immediate interest. Some Estonian companies are developing their own drone's models and sell their services internationally for cinematographic or even military purposes. Renowned Technical Universities in Estonian are serving drone manufacturers with an important pool of skilled engineers contributing to the development of this growing technology also "made in Estonia".

Presence:

Estonian Companies:

- **Threed Systems:** Company specialized in developing, producing and operating drones and subsystems. Their products are mainly directed to military forces. Their drones are ranged in mini-, tactical- and operational levels depending on their maximum payload and their endurance. Their operational drone THEIA can carry a payload of 25Kg and has endurance up to 24h. The company produces most parts of its drones (frames, wings...) but works also with foreign suppliers and local subcontracting partners. They also produce their own autopilot, ground control station and camera gimbal. The company provides training and consulting services.
- **Eli Airborne Solutions:** Design and conception of military and commercial Drones. They provide complete solutions for military and homeland security by producing customized drones.
- **Helicam:** One of the European leaders in close range aerial video, photo and cinematography using Drones. Helicam fly its drones for films, commercials and television productions. Their services include pre-planning, insurance, permissions, all the necessary equipment's, remote control gyro stabilized camera head, 6K camera with Zeiss lenses, wireless video assist. Based in North Europe, they work worldwide.
- **Airborne Mechatronics:** The Company is supported by the same owner as Threed System. Instead of fixed wings Drones, they are designing and manufacturing

multirotor drones for professional applications. Their main customers are cinematographic studios but they are trying to widen their range of customers by starting to work with utilities companies. Products are offered in Ready to Fly condition or as unassembled kits. They have an online shop where they also sell spare parts as a profitable business.

- [Skycam](#): Aerial media services provider. Their services are used in commercials, documentaries, feature films and TV series by taking photos of nature, real estate, animals and people.
- [Skyline Media](#): Company specialized in aerial cinematography, aerial photography, and live broadcasts for movies, commercials, music videos, TV series, documentaries and outdoor filming activities.
- [Coptercam](#): Partner and distributor for DJI, world-leading developer and manufacturer of drones.
- [ELKO](#) (distributor in the Baltic States): Elko is one of the largest IT product wholesalers in Eastern Europe. During summer 2015, they entered in agreement with AEE Technology Co. Ltd (Chinese drone manufacturer) to distribute their products in the Baltics.
- Retailers:
 - [GPS.ee](#): Sells a wide range of drones and spare parts on its e-Shop.
 - [Droon.ee](#): Sells a wide range of drones and spare parts from various constructors also provide leasing services.
 - [Photo Point](#): Sells drones and spare parts from various brands (DJI, Parrot, Yuneec).
 - [Kopterid.ee](#): Sells Parrot, DJI and Syma drones and spare parts.
- Toys & Hobby:
 - [Audiocity.eu](#): Sells Parrot's drones.
 - [Klick.ee](#): Sells Parrot and Jamara drones.
 - [Euronics.ee](#): Sells Parrot and Jamara drones.

Concurrence:

Foreign manufacturers distributed in Estonia:

- Blade (US)
- Jamara (Germany)
- DJI (China)
- Yuneec (China)
- FatShark

- Parrot (France)
- AEE (China)
- Syma (China)

Law:

Rules are determined by the Estonian Civil Aviation Administration (ECAA). Pilots are responsible for their drones and any damage it could cause. Flying a drone without license is allowed only in uncontrolled airspace below 150m. Flying above 150m requires a license from the ECAA.

Perspectives:

Private companies and public utilities companies are getting more and more interested by drones. They see how these tools can improve their efficiency in daily tasks such as infrastructure inspection, land measurement, risk avoidance...

The main drone manufacturers in Estonia direct their products towards military forces and Security organisations rather than towards civilian use. The global drone market is dedicated at 89% to the military and only 11% to civil use. This might be the reason why these companies give only little interest to the civilian sector. Thus there might be some room to fill as there are not many Estonian companies delivering global drone solutions.

At the moment there is no such thing as an Estonian association of drone users and manufacturers. Thus it might take some time to educate Estonians on the benefits they could get from the drone industry development.

In agriculture for example, drones mounted with multispectral cameras can detect minerals in soils, sickness in plants. It has been observed that the use of drones in agriculture helps reducing costs by 40% and grow production by 15%. There are many potential applications to explore and to develop in Estonia, but the public need to be convinced and the companies need to be showed the capital gain they can obtain thanks to drone usage.