Market Disruption Strategies:

The Transformation of Xiaomi

Source: Xiaomi

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Extra teaching materials are available at https://publishing.insead.edu/case/xiaomi

Introduction

Despite numerous long meetings, executives at Xiaomi were still agonizing over what to do to reignite the brand's growth in China. Although Xiaomi had achieved unprecedented success in launching and marketing smartphones a few years earlier, its market share had since stagnated and then declined. Competitors — both preeminent international players and large domestic brands — responded aggressively to its every move, vying to snatch a share of its customer base. Xiaomi urgently needed a new strategy to empower growth and ultimately attain market dominance.

The Market

Chinese Consumers

With over 1.37 billion people in 2016, China was the most populous nation and the world's largest market for many categories of consumer goods and services. About 30% of Chinese were below the age of 25, 48% were between 25 and 54, 11% were aged 55-64, and 11% were over 65 (see Exhibit 1A). The population is scattered across a vast land mass. Based on factors such as population size and household income, Chinese cities are classified into tiers (see Exhibit 1B). In Tier 1 are the most developed, modern metropolises — Beijing, Shanghai, Guangzhou, and Shenzhen. Tier 2 has major provincial capitals and cities on the Eastern coast; Tiers 3 and 4 have smaller cities in the less-developed interior. Beyond these are remote towns and rural villages. About 70% of the population reside outside Tiers 1 and 2.

China's economy had grown rapidly since the late 1970s, reaching $11.19 trillion in 2016 — the second largest in the world. The World Bank projected that the economy would further expand in the next decade, potentially overtaking the U.S. economy as the world's largest. Economic growth had boosted incomes (see Exhibit 1C), fuelling a desire for higher quality goods and services. This consumption upgrade trend was especially strong in top-tier cities where income levels were higher. In lower tier cities, incomes were expected to rise considerably in the coming years, further driving the upgrade trend (see Exhibit 1D). According to McKinsey's China Consumer Report, many Chinese consumers were value conscious — when they paid more, they expected the increase in quality to match.

China's consumers had adopted information technology on a massive scale. The internet penetration rate surpassed 53% in 2016 (see Exhibit 2A). E-commerce had grown with it, reaching ¥20.2 trillion in 2016 — the highest in the world (see Exhibit 2B). A 2016 survey of Chinese consumers (over 13) by McKinsey put e-commerce penetration at 89% in tiers 1 and 2 cities, and 62% elsewhere.

China's Mobile Phone Market

In the late 2000s, mobile phones had evolved from feature phones (for calling and texting) to smartphones that could be used for email, web browsing, music/videos, etc. — capabilities previously available only from computers. In China, the smartphone era dawned in 2013, with the deployment of 3G mobile phone infrastructure across the nation providing high-speed

connections for smartphone apps. Over 150 million Chinese consumers subscribed to 3G connectivity, making it the world's biggest smartphone market. Thereafter, the 4G network was gradually rolled out (starting with the higher tier cities), further boosting smartphone consumption. Euromonitor estimated that over 467 million smartphones were sold in China in 2016 (see Exhibit 3). Increased connection speed meant they could be used for data-intensive services like audio/video chat, video streaming, games and navigation. It also facilitated a new generation of artificial intelligence (AI) based mobile apps (e.g., voice-based personal assistant) that required fast transmission of large amounts of data between back-end servers and phones.

Smartphones were sold through both internet-based and brick-and-mortar channels (see Exhibit 4). Online distribution accounted for 39% of total sales volume but began to slow by 2016. The majority of consumers, especially those in lower tier cities, still preferred to buy from a brick-and-mortar store, where sales staff could, for example, help them activate and set up their new smartphone, or show them how to use the ever-growing number of apps.

Mobile phone brands battled for market share in China (see Exhibit 5). No brand controlled more than 17% of the market and many had relatively small market shares. Of the top six brands that accounted for over 71% of the market, Apple and Samsung were international players, while Huawei, OPPO, vivo and Xiaomi were home-grown Chinese brands.

Apple's iPhone was the strongest international contender in the Chinese mobile market, with a 9.5% market share (by sales volume) in 2016. The U.S. firm was the pioneer of touchscreen-based smartphones, renowned for its exceptional design aesthetics and user-friendly software (iOS). iPhones came with proprietary apps such as the AI-enabled voice assistant, Siri. As a first mover with a sizable global market share, Apple's iOS attracted software developers who created a variety of apps for iPhone users. Apple invested heavily in developing advanced software, including an AI-based facial-recognition to unlock the phone (rather than typing a password). The iPhone was positioned to serve the premium segment of the market, with high-quality hardware and software and a premium price. Apple leveraged online channels (its own website) as well as the major Chinese e-commerce portals like TMall.com and JD.com[1]. In 2016, over 40 Apple Stores across the major cities in China served as a direct distribution channel for iPhones. It also had third-party, brick-and-mortar distributors such as telecoms' sales outlets and independent consumer electronics stores. Its advertising projected an image of an American, premium smartphone (see Exhibit 6).

Samsung served the Chinese market with its Galaxy mobile phones. It did not garner the same level of international acclaim as the iPhone, but the South Korean brand performed well before 2013, with a premium global brand positioning (lower than that of the iPhone). Galaxy phones had high-end hardware specs and relatively high prices, targeting premium and sub-premium segments. The operating system was based on Android, an open-source software developed by Google, which allowed users to access numerous apps created by Android

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1   To distribute through e-commerce portals such as TMall and JD, a firm typically paid a set-up fee, an annual maintenance fee, and 2%-8% commission on each item sold.

software developers worldwide. Galaxy phones came with Samsung's own AI-based personal assistant software, Bixby.

Around 2013, Galaxy started to lose market share. From 2013 to 2016, reports of Galaxy phones that burst into flames or exploded had a substantial impact on consumer perceptions. Sales of its flagship models such as Galaxy S7 declined drastically, notwithstanding advanced features such as wireless charging and IP68-level dust and waterproofing. Advertising efforts to stem the decline proved ineffective (see Exhibits 5 and 7). Meanwhile, Chinese brands rose in market share.

Huawei's core business was telecommunication network equipment, but in 2004 it started to focus on the smartphone sector. Initial handsets lacked the design aesthetics of Apple and Samsung. To address this shortcoming, Huawei recruited the former chief designer of BMW (Hagen Fendler) and former creative director of Apple (Abigail Brody) and began producing increasingly stylish phones. By 2016, Huawei's phones ranged from entry-level to premium in terms of specs and price levels, targeting the corresponding consumer segments — the sub-brand Honor for the entry-level segment, and the Mate series for sub-premium and premium segments. Like Samsung, Huawei relied on the Android operating system, which allowed users to benefit from the vast array of Android apps. To project an image of a top Chinese brand with international appeal, Huawei recruited Hollywood celebrities such as Scarlett Johansson as its brand spokesperson (see Exhibit 8) and Gal Gadot as its promoter on Chinese social media (see Exhibit 9). In addition to online distribution through its own website and major Chinese e-commerce portals, it had strong offline distribution. Ties with Chinese telecom firms made its products available in their retail outlets in all city tiers. It also had its own independent electronics stores across the nation. By 2016, Huawei had attained the largest market share among all smartphone brands in China.

OPPO and vivo shared the same parent company, BBK Electronics, which had been in consumer electronics for decades, making computers and video game consoles. BBK had developed a nationwide network of distributors, which the smartphone duo inherited and further expanded. They had strong brick-and-mortar distribution channels (including telecoms' sales outlets and independent electronics stores) across all city tiers and even in small towns and villages, supplemented by e-commerce portals. Both brands offered smartphones with specialized music and video-playing functions (e.g., Hi-Fi speakers, MP3/MP4 player). OPPO used AI-based software to improve photos and 'beautify' selfies. vivo had an AI-based personal assistant, Jovi, as well as photo-enhancing tools. Targeted at younger consumers with low-to-middle incomes, both invested heavily in advertising. OPPO's ads featured popular Chinese celebrities such as YANG Mi (see Exhibit 10) and emphasized its fast-charging ability: "Charge for five minutes. Talk for two hours." vivo's ads featured celebrities such as the South Korean star Song Joong Ki, targeting young female consumers who were avid fans of Korean films and TV shows.

Xiaomi

The Rise of Xiaomi in China (2010-2014)

Xiaomi (小米) was cofounded in 2010 by LEI Jun, a software developer and serial entrepreneur who achieved celebrity status for his role in building successful IT companies in China. The other cofounders — HONG Feng, LI Wanqiang, LIN Bin, LIU De, WONG Kong-Kat and ZHOU Guangping — were software developers, hardware engineers and industrial design experts. The group of cofounders wanted to make "quality technology accessible to everyone" (see Exhibit 11A), and the firm they created quickly became a disruptor in the Chinese smartphone market.

Unlike any other firm, Xiaomi entered the Chinese mobile phone market in 2010 by launching smartphone software. Based on the Android operating system, Xiaomi's MIUI software sought to provide a better user-experience than other Android-based smartphone operating systems on the market. To achieve this, Xiaomi courted and interacted with a large online community of smartphone users who helped test various versions of MIUI, debug issues and provide ideas for improvements. New versions were frequently released for free installation on Android-compatible phones, allowing MIUI fans to benefit from their contribution — in stark contrast to other domestic players who did not involve consumers in R&D to the same extent.

Through the collaborative process, Xiaomi was able to develop a user-experience-oriented smartphone OS that fulfilled previously unmet needs (e.g., easy-to-activate flashlight, lunisolar calendar, customizable dial tone). This became a point of differentiation and a competitive advantage. Through user engagement, Xiaomi was also able to enhance brand awareness and attract a sizable group of current smartphone users who could become adopters of Xiaomi's smartphones. From a long-term perspective, the success of MIUI helped Xiaomi financially: the more people who used the software, the more smartphone-based services (e.g., games, music) they could purchase through MIUI. With each purchase, Xiaomi received a commission from the service provider.

Xiaomi introduced a series of smartphones (Mi 1, 2, and 3) over the next three years (see Exhibit 12) to serve the mid-tier market segments, with each successive model superior in specs. In 2013, it added a product line for the entry-level segment. Just as it had engaged with user communities for MIUI, Xiaomi actively engaged with smartphone users through online communities to improve its phones. Engineers were encouraged to interact with users online to seek feedback, inspiration, and ideas for product improvement. Xiaomi even erected a statue at its Beijing headquarters in tribute to the online communities (see Exhibit 11B). It also held (offline) events for active community members (see Exhibit 13) where they could enjoy live performances and meet face-to-face with people who had previously been 'usernames' on the screen. Top executives often participated in these events, thanking ardent supporters. This level of user engagement — never achieved by its rivals — meant that Xiaomi could address technical issues faster and develop new functionalities sought by end-users. This further enhanced its reputation as a consumer-centred brand.

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To achieve the "quality technology at an affordable price" positioning, Xiaomi enforced a low-margin policy — the net profit margin of its phone hardware (total revenue minus all costs associated with doing business) was pegged no higher than 5%. This helped ensure that consumers got higher value from Xiaomi than from any other brand. Unlike the other brands in the market, Xiaomi largely focused on online direct-to-consumer distribution via its own website and its shops on major e-commerce portals. By avoiding layers of intermediaries inherent in traditional offline distribution and by largely centralizing its distribution system, Xiaomi could price its phones (with comparable specs) below its competitors.

Xiaomi's low-cost promotion tactics also helped keep prices down. Unlike other brands, Xiaomi spent very little on advertising — it did not even have an official budget for advertising and promotion during the early years. Rather, leveraging the ubiquity of social media, the firm relied on word-of-mouth. LEI Jun, Chairman and CEO of Xiaomi, often spearheaded social media messaging himself, announcing product launches and events, sparking online conversations about Xiaomi products to attract potential consumers. This marketing approach brought significant cost savings. According to CHEW Shou Zi, Senior VP of the firm, Xiaomi only spent around 10% of its revenue on business operations (4.4% for marketing-related activities) in 2016. In contrast, Huawei spent 16.6% of revenue on marketing-related activities in 2016; OPPO and vivo exceeded 30%.

In 2013, Xiaomi's phones were selling for less than those of its competitors. For example, Mi 3 (64GB version) retailed for RMB 2,499, whereas the competing models (some with inferior specs) retailed for higher prices: iPhone (32GB version) at around RMB 6,088; Galaxy (64GB version), RMB 5,399; OPPO / vivo (32GB version), RMB 3,498; and Huawei (8GB version), RMB 2,688. Given the favourable price-to-value ratio, the brand took off among internet-savvy segments, especially young consumers in tier 1 and 2 cities. Demand was so high that whatever Xiaomi could manufacture each week would be sold within hours (even within 30 seconds) on its website. For quite some time, it had no choice but to only sell its products one day per week (every Tuesday at 10am). This (inadvertently) created a "hunger marketing" phenomenon — product scarcity triggered avalanches of social media postings and discussions, further stimulating demand. As WANG Xiang, President of Xiaomi, noted: although Xiaomi offered fewer phone models than its rivals, every one of the models was a Baopin (爆品) — "explosive product" in terms of sales volume. By 2014, Xiaomi had become the largest brand in the Chinese smartphone market, with a 15% share.

Stagnation and Challenges (2015-2016)

In the period 2015-2016, stagnation and decline set in (see Exhibit 5). The industry growth rate slowed as many consumers had either switched from 3G to 4G phones or purchased 4G phones as their first smartphones. Huawei had improved its product lines, targeting the same consumer segments as Xiaomi. Huawei's sub-brand Honor competed head-on with Xiaomi's entry-level product line for the mass market segment, as did Huawei's Mate series for the sub-premium segment. Huawei also had strengthened direct-to-consumer distribution with its own e-tailing portal, yielding cost savings and thus more competitive pricing.

Xiaomi's customers were typically young people in tier 1 and 2 cities, with low-to-mid-level incomes, internet savvy and knowledgeable about smartphones. Given Xiaomi's success in marketing its phones to this segment, as well as intense competition, further growth was increasingly difficult. It began setting up a few offline stores — Xiaomi Home (小米之家) — in tier 1 and 2 cities to court consumers who preferred brick-and-mortar to e-tailing (see Exhibit 14). However, the cost associated with establishing, running, and promoting such offline stores was much higher than that for e-tailing. For instance, whereas a website could display thousands of additional products with virtually no marginal cost, a physical store could not. Additional floor-space cost extra, and prime locations (such as popular malls) cost even more. Rent in higher tier cities could reach 15 RMB per m² *per day*, with a typical Xiaomi's store ranging between 200m² and 500m². In lower tier cities, rent was around 10 RMB per m² per day and stores were typically 100m² to 300m². According to ZHANG Jianhui, VP of Xiaomi China, annual rent hikes in premium locations were as high as 5-7%. Further costs were associated with hiring and training sales staff, and the logistics of managing decentralized inventories in different geographic locations. These were making it difficult to maintain Xiaomi's current price levels in the long term.

Xiaomi did not have strong physical distribution in tiers 3 and 4 (and beyond) — where most consumers preferred to shop for smartphones offline. It hence could not capitalize on growth in smartphone adoption in those areas. This posed a challenging issue, as developing offline stores in those areas would not only be complex and time consuming but also take resources away from other endeavours.

Xiaomi sought to boost revenue by leveraging its brand and distribution system. The firm broadened the range of products sold through its online and offline distribution systems by developing and launching products other than smartphones (e.g., televisions, smart lamps). Xiaomi also acquired stocks in other firms producing consumer electronics such as fitness bands and air purifiers. These financial investments accounted for substantial expenditure in 2015-2016. According to LIU De, cofounder and Senior VP, the initial selection of partner firms was largely based on personal connections with the owners — decades-long relationships helped Xiaomi assess their technical competence and whether they shared Xiaomi's vision and values. Even without having a controlling share, Xiaomi was able to work with these firms to develop new products specifically for its outlets, which conformed to the design aesthetics and quality of the Xiaomi brand. To support these collaborations, Xiaomi frequently sent teams of its own executives and engineers to assist the partner firms in areas such as R&D, sourcing and manufacturing.

For instance, Mi Band 2 (a personal fitness monitoring device) and Mi Robot Vacuum (an automated household vacuum cleaner) were brought to market in this period (see Exhibits 15 and 16). Both had sleek simple designs, offered functionalities similar to competing products (e.g., Fitbit's Alta and iRobot's Roomba, respectively) but at a lower price point: Mi Band 2 retailed for RMB 149, but Fitbit Alta, RMB 1,298; Mi Robot retailed for RMB 799, but Roomba, RMB 2,499. Xiaomi also invested in developing Internet-of-Things (IoT) technologies to link products such as the Mi Band 2 and Mi Robot with its smartphones. For example, users could unlock a Xiaomi phone simply by placing their Mi Band 2 close to the

phone. Xiaomi smartphones could be used to program and control how Mi Robot operated, features unavailable in competitors' offerings.
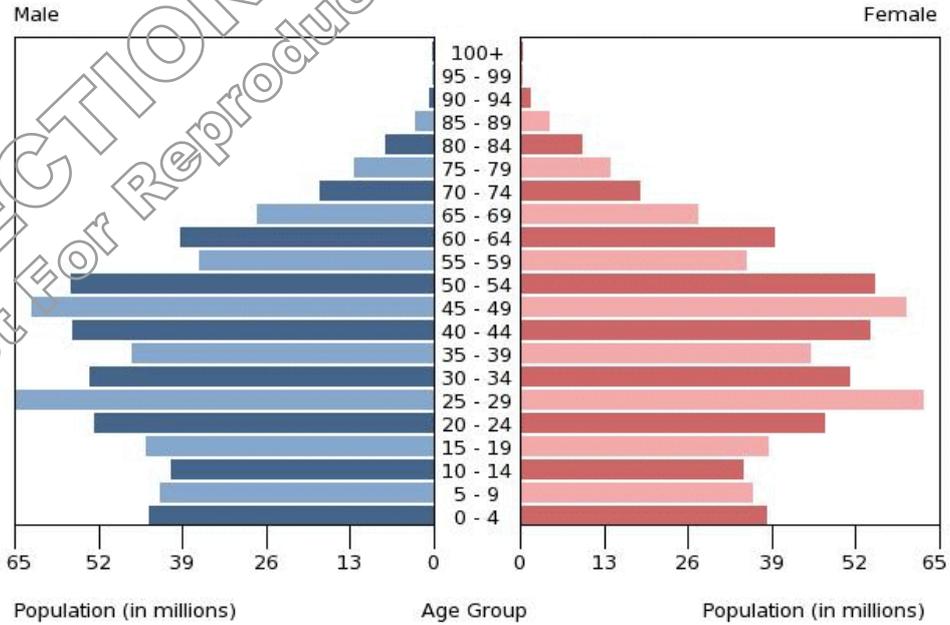
Collaborating firms were also able to distribute their own branded products through Xiaomi online and offline outlets. For instance, Smartmi (智米) sold its own brand of air purifiers and air conditioners; Roborock (石头), floor mopping robots; and TinyMu (小沐), smart toilet seats (see Exhibit 17). This further expanded the portfolio of products Xiaomi distributed.

By the end of 2016, non-smartphone products (over 50 categories) sold through Xiaomi's distribution platforms accounted for 18% of its revenues and many yielded net margins on hardware higher than 5%. The majority of Xiaomi's revenue came from its core business — smartphones. Its market share in this category however had begun to decline. Given the other challenges it was facing, particularly those associated with expanding into new categories, Xiaomi urgently needed to formulate a new strategy.
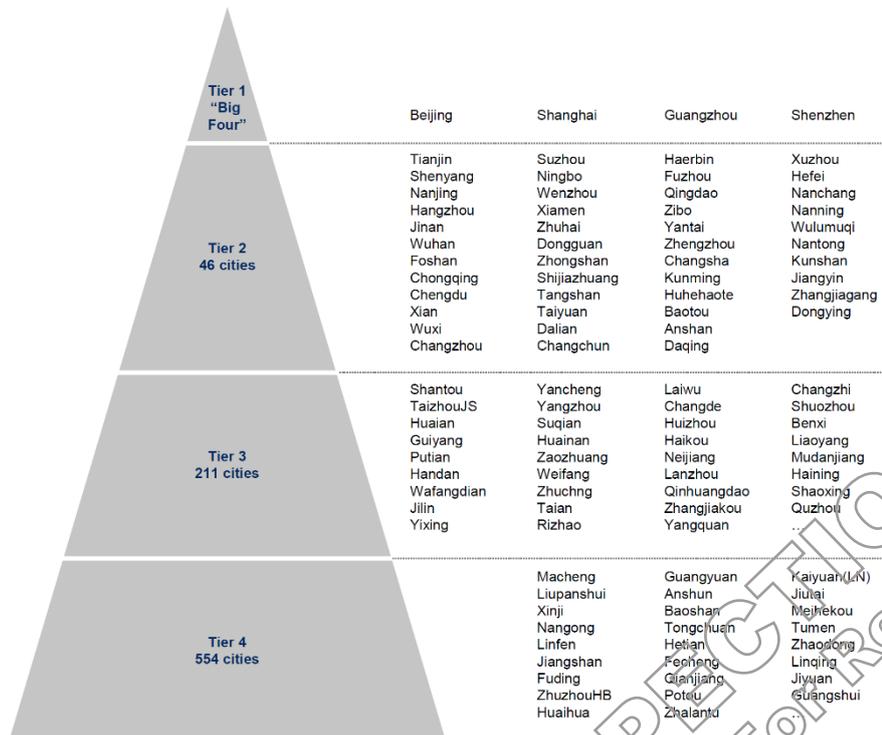
Exhibit 1A

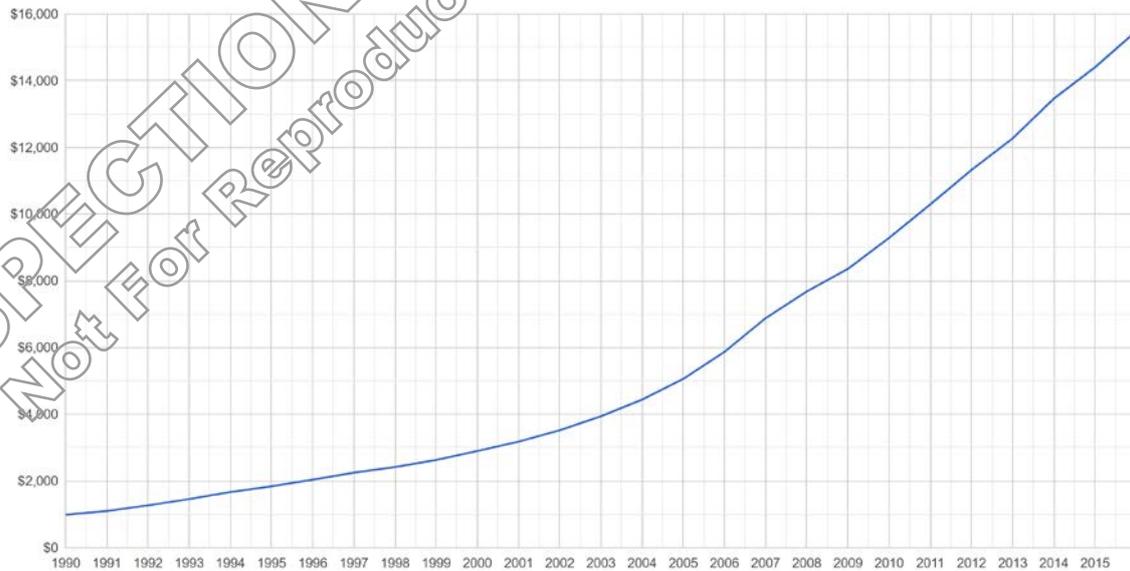*China's Population Distribution in 2016*

Source: https://www.cia.gov/the-world-factbook/

Exhibit 1B

City Tiers in China

	Beijing	Shanghai	Guangzhou	Shenzhen
Tier 1 "Big Four"	Beijing	Shanghai	Guangzhou	Shenzhen
Tier 2 46 cities	Tianjin	Suzhou	Haerbin	Xuzhou
	Shenyang	Ningbo	Fuzhou	Hefei
	Nanjing	Wenzhou	Qingdao	Nanchang
	Hangzhou	Xiamen	Zibo	Nanning
	Jinan	Zhuhai	Yantai	Wulumuqi
	Wuhan	Dongguan	Zhengzhou	Nantong
	Foshan	Zhongshan	Changsha	Kunshan
	Chongqing	Shijiazhuang	Kunming	Jiangyin
	Chengdu	Tangshan	Huhehaote	Zhangjiagang
	Xian	Taiyuan	Baotou	Dongying
	Wuxi	Dalian	Anshan	
	Changzhou	Changchun	Daqing	
Tier 3 211 cities	Shantou	Yancheng	Laiwu	Changzhi
	TaizhouJS	Yangzhou	Changde	Shuozhou
	Huaian	Suqian	Huizhou	Benxi
	Guiyang	Huaian	Haikou	Liaoyang
	Putian	Zaozhuang	Neijiang	Mudanjiang
	Handan	Weifang	Lanzhou	Haining
	Wafangdian	Zhuchng	Qinhuangdao	Shaoxing
	Jilin	Taian	Zhangjiakou	Quzhou
	Yixing	Rizhao	Yangquan	...
Tier 4 554 cities		Macheng	Guangyuan	Kaiyuan(LN)
		Liupanshui	Anshun	Jiutai
		Xinji	Baoshan	Meihekou
		Nangong	Tongchuan	Tumen
		Linfen	Hetian	Zhaodong
		Jiangshan	Fecheng	Linqing
		Fuding	Qianjiang	Jiyuan
		ZhuzhouHB	Potou	Guangshui
		Huaihua	Zhalantu	...

Source: McKinsey Insights China

Exhibit 1C
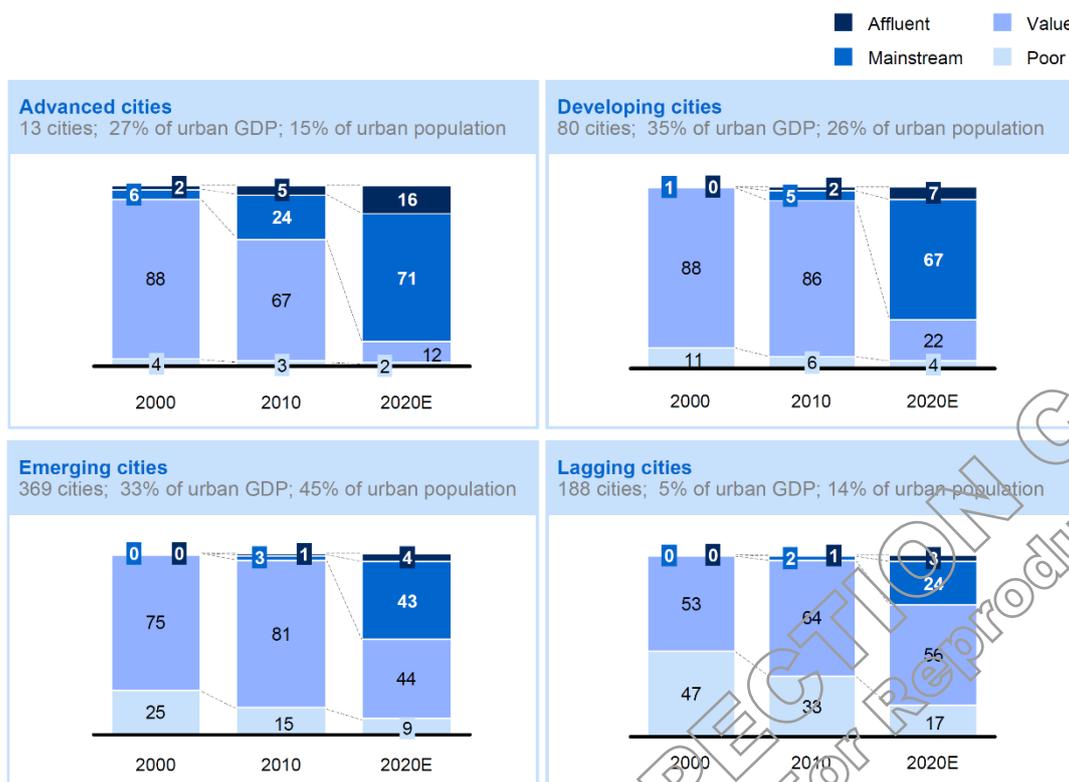### *Per Capital Income Growth in China (1990-2016)*

Note: Gross National Income per capita in Purchasing Power Parity dollars, adjusting for price level differences across different economies in the world.
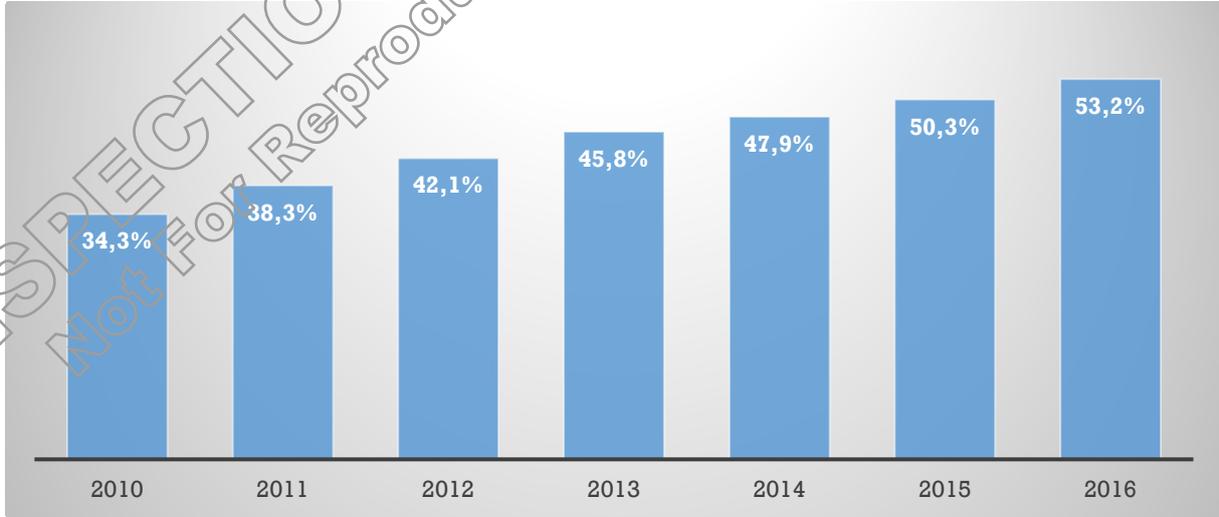
Source: https://databank.worldbank.org

Exhibit 1D
Predicted Income Growth across City Tiers

Legend: Affluent, Mainstream, Value, Poor

Advanced cities
13 cities; 27% of urban GDP; 15% of urban population

	2000	2010	2020E
Affluent		5	16
Mainstream	6	24	71
Value	88	67	12
Poor	2		
	4	3	2

Developing cities
80 cities; 35% of urban GDP; 26% of urban population

	2000	2010	2020E
Affluent	1	5	7
Mainstream	0	2	67
Value	88	86	22
Poor	11	6	4

Emerging cities
369 cities; 33% of urban GDP; 45% of urban population

	2000	2010	2020E
Affluent	0	3	4
Mainstream	0	1	43
Value	75	81	44
Poor	25	15	9

Lagging cities
188 cities; 5% of urban GDP; 14% of urban population

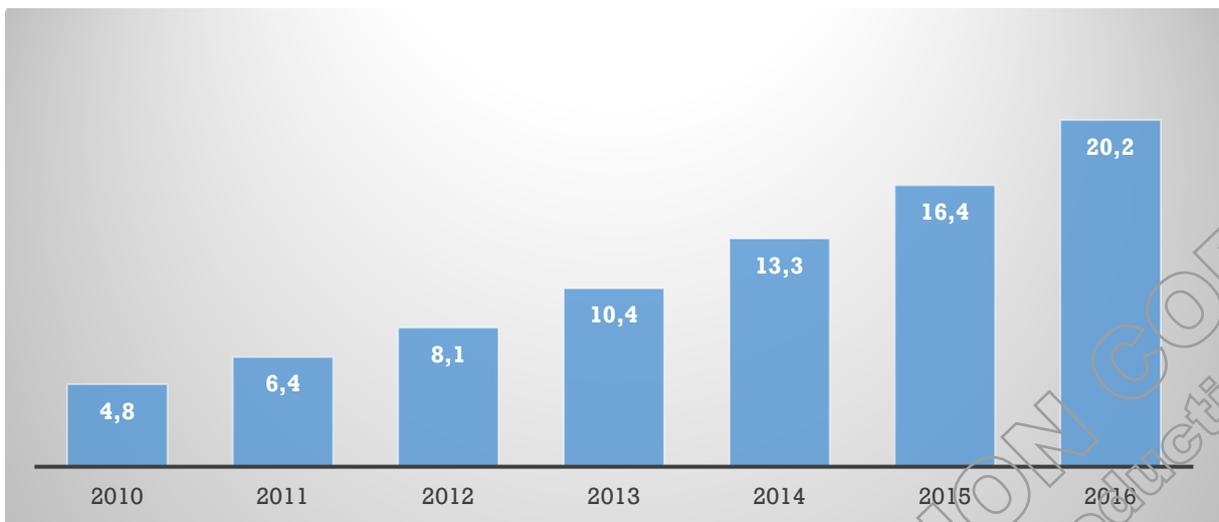|	2000	2010	2020E
Affluent	0	2	3
Mainstream	0	1	24
Value	53	54	56
Poor	47	33	17

Source: McKinsey Insights China

Exhibit 2A
Internet Penetration Rate in China
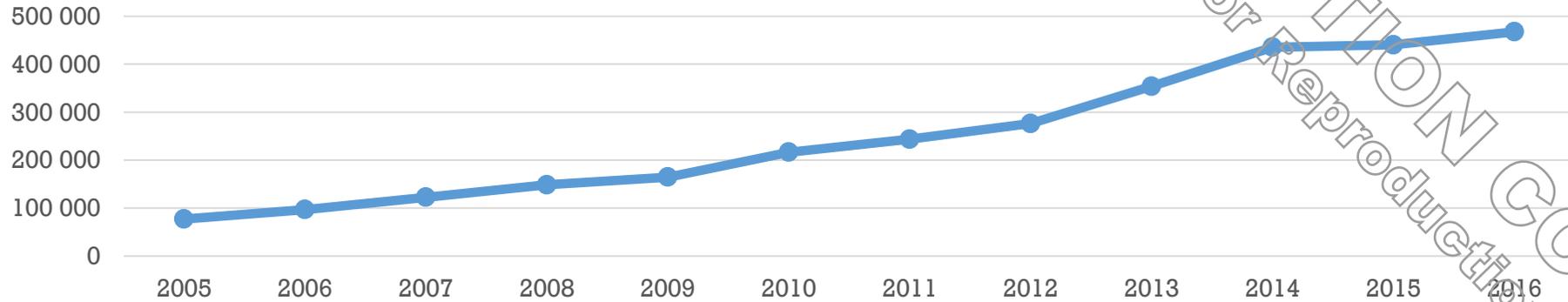

Source: CNNIC

Exhibit 2B
Growth in E-commerce in China (in trillion RMB)

Source: iResearch

Exhibit 3

Sales Volume (in thousands of units) of Smartphones in China
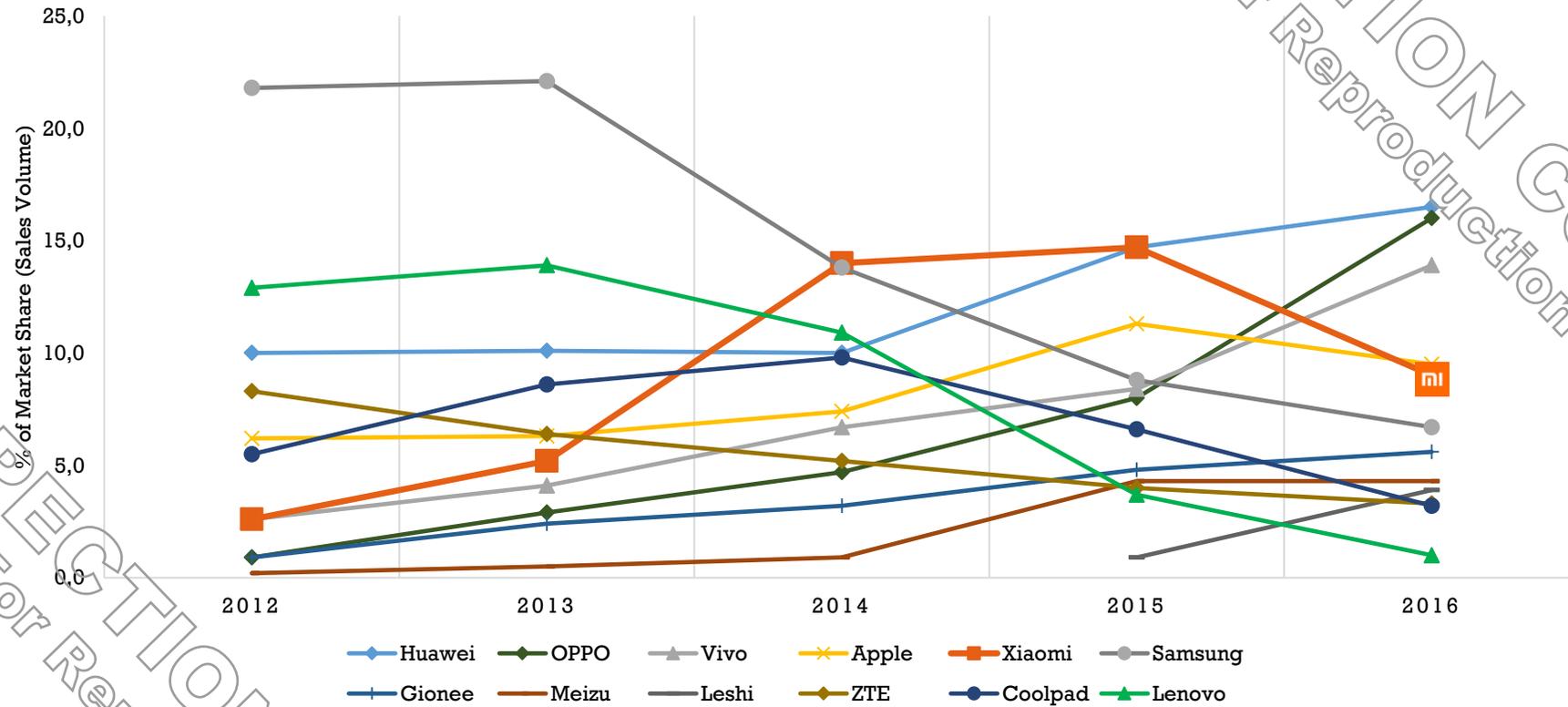

Source: Euromonitor Market Report

Exhibit 4

Share (%) of Smartphone Distribution by Channel in China

| Outlet Type	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Store-Based Retailing	98.7	98.5	98.2	97.9	97.4	92.7	88.0	81.8	77.3	69.4	64.0	60.1
Electronics and Appliance Specialist Retailers	62.3	65.4	82.8	83.2	81.0	77.8	75.0	70.7	67.5	59.5	54.6	51.2
Hypermarkets and Other Mixed Retailers	36.4	33.1	15.4	14.8	16.4	14.9	13.0	11.1	9.8	9.9	9.4	8.9
Non-Store Retailing	1.3	1.5	1.8	2.1	2.6	7.3	12.0	18.2	22.7	30.6	36.0	39.9
Homeshopping	0.7	0.9	1.0	1.1	1.3	1.4	1.3	1.2	1.2	1.1	1.0	0.9
Internet Retailing	0.5	0.7	0.9	0.9	1.3	5.9	10.7	17.0	21.5	29.5	35.0	39.0

Source: Euromonitor Market Report

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Exhibit 5
Major Smartphone Brands and Their Market Shares in China (2012-2016)

Note: Brands with at least 1% market share in 2016 were shown.

Source: Euromonitor Market Report

Exhibit 6
Apple's iPhone 7 Ad
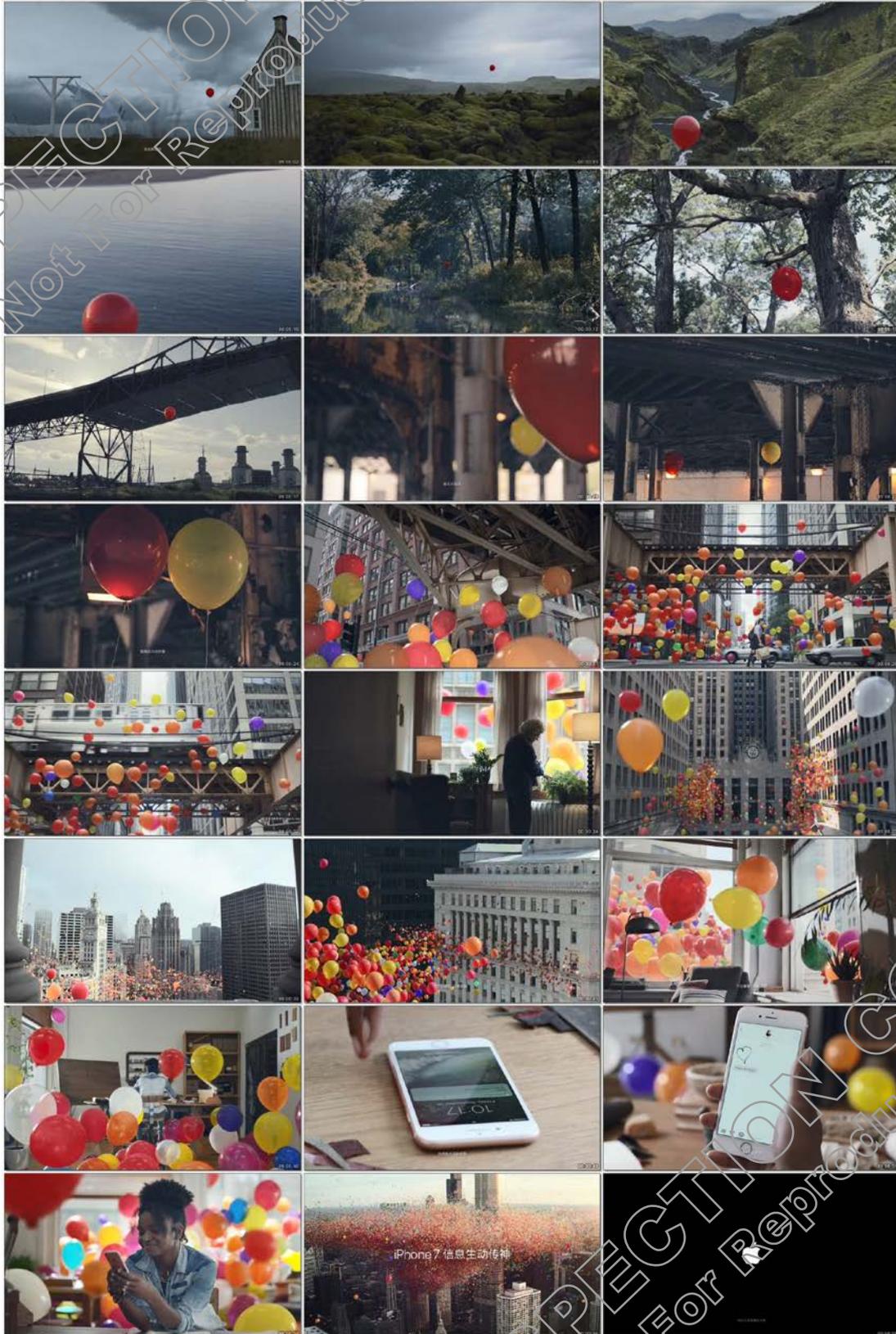
Source: Apple

Exhibit 7
Samsung's Galaxy S7 Ads

"Being different. That's why. Galaxy."
Source: Samsung

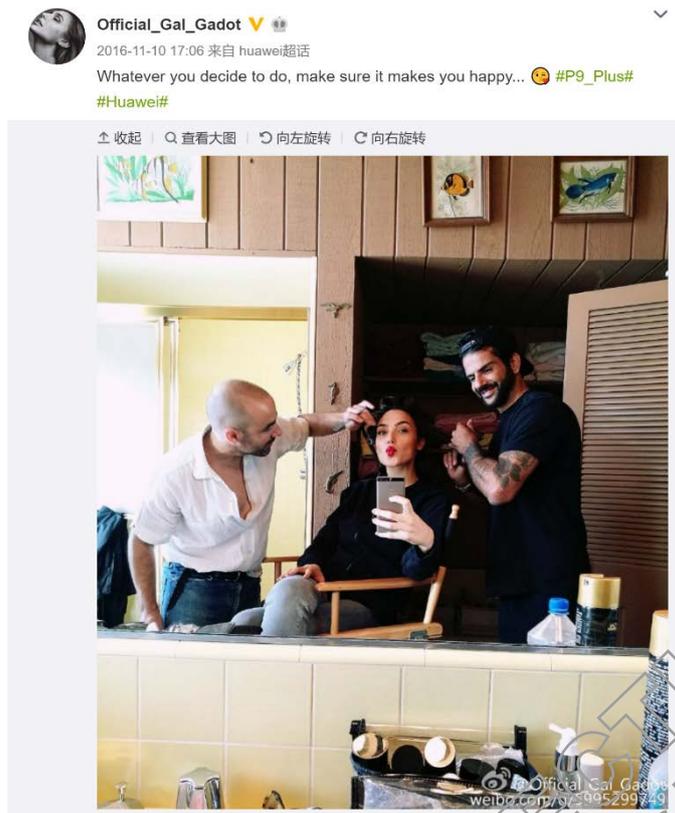14

Exhibit 8
Huawei Ads Featuring Scarlett Johansson

Source: Huawei

Exhibit 9
Gal Gadot's Social Media Posting for Promoting Huawei

Official_Gal_Gadot ✔
2016-11-21 23:31
Style + Smile 😊 #P9_Plus##black&white# @华为手机

↑ 收起 | 🔍 查看大图 | ↺ 向左旋转 | ↻ 向右旋转

Official_Gal_Gadot ✔
2016-11-10 17:06 来自 huawei超话
Whatever you decide to do, make sure it makes you happy... 😊 #P9_Plus#
#Huawei#

↑ 收起 | 🔍 查看大图 | ↺ 向左旋转 | ↻ 向右旋转

📍 huawei超话

Source: https://www.weibo.com/u/5995299749

Exhibit 10
OPPO and vivo Ads

OPPO

充電5分鐘 通話2小時

中國影視女神 楊冪

"Charge for 5 minutes. Talk for 2 hours"

vivo
Hi-Fi & Smart

X7

1600万柔光自拍 照亮你的美

16M Pixel selfies. Capture your beauty

vivo
Hi-Fi & Smart

宋仲基
vivo 全新代言人

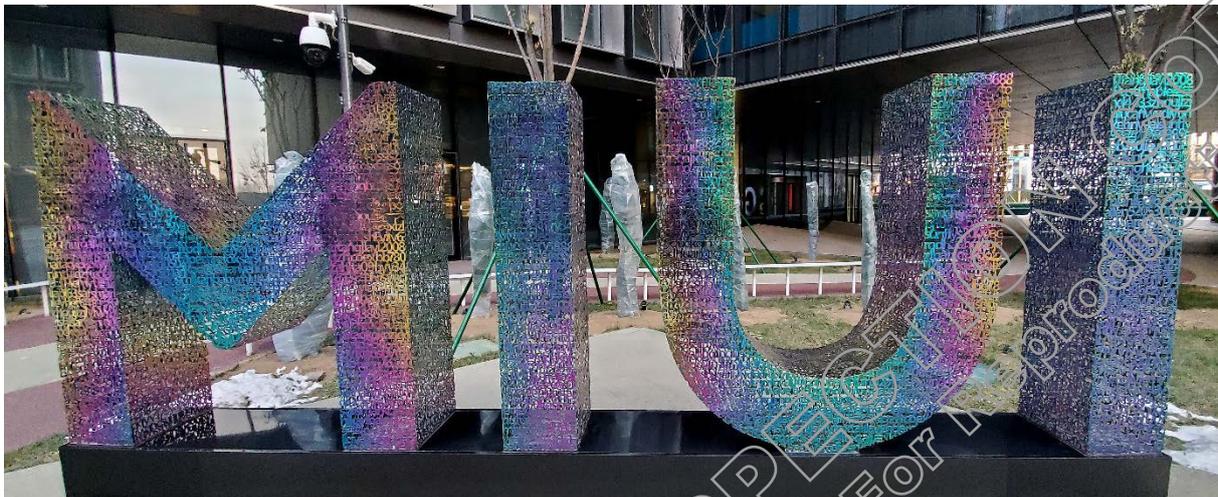*"Song Joong Ki, the new vivo brand spokesperson"*

Source: OPPO & vivo

Exhibit 11A
"Making Quality Technology Accessible to Everyone"
(on Xiaomi's Office Floor)

Exhibit 11B
MIUI Statue at Xiaomi Headquarters in Beijing
(with Names of Initial Active Users Carved Out)

Source: Photos taken by the authors

Exhibit 12
Mi 1 (Released in 2011)
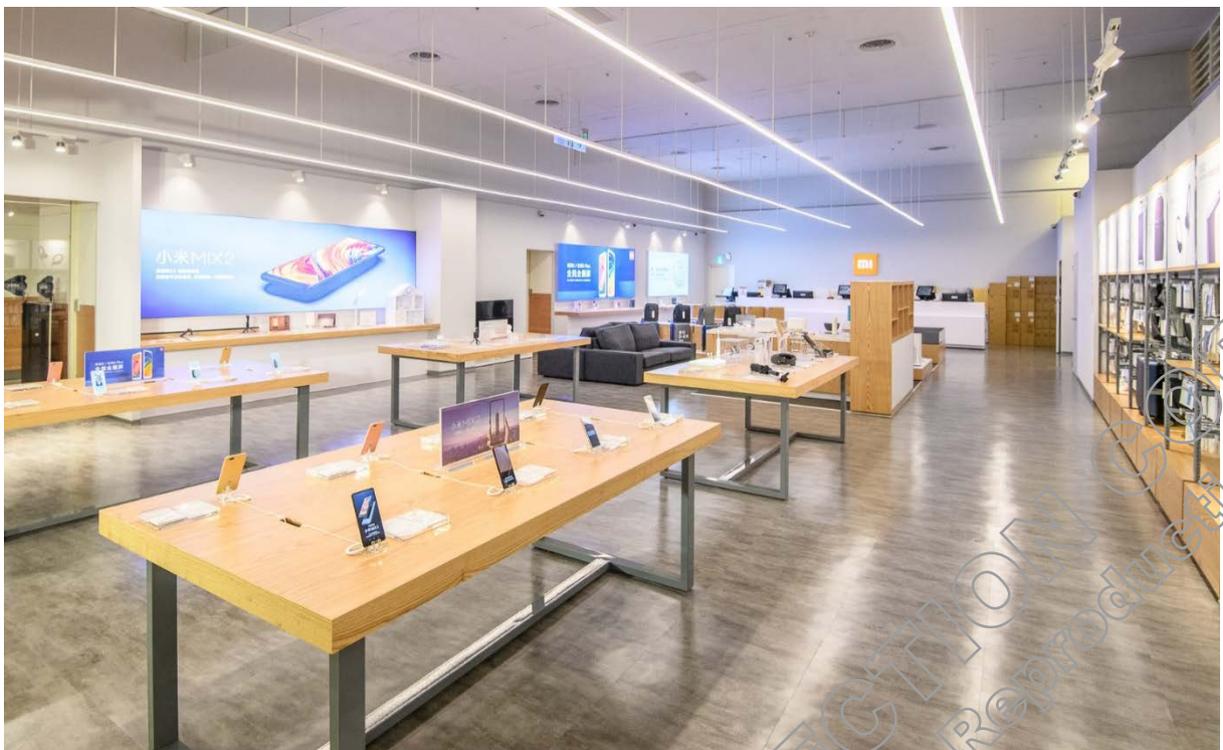

Mi 2 (Released in 2012)

Mi 3 (Released in 2013)

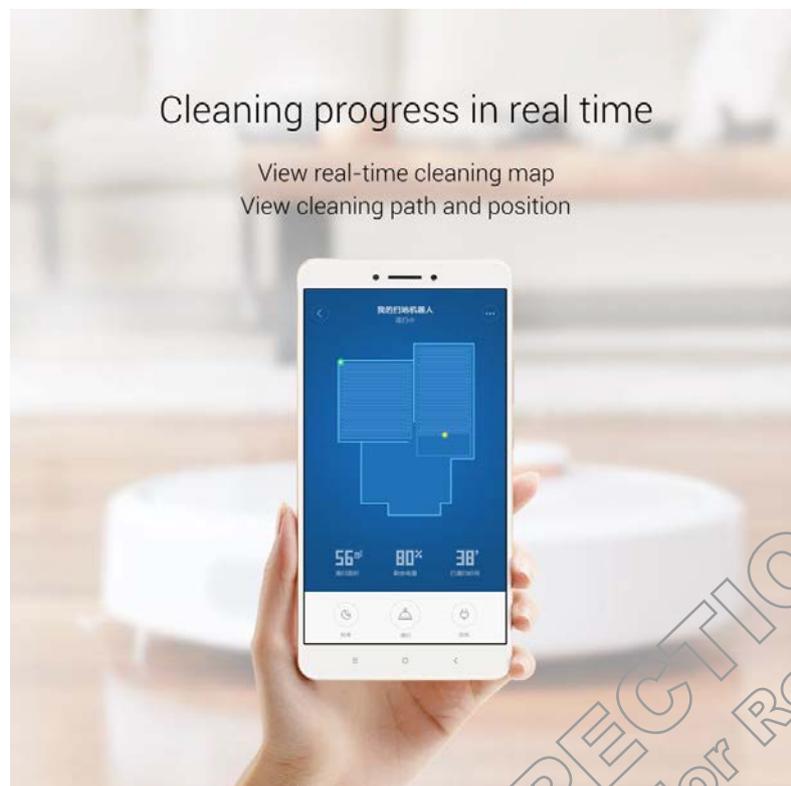Source: Xiaomi

Exhibit 13

Xiaomi's User Engagement Events

Source: Xiaomi

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Exhibit 14
Xiaomi Zhi Jia (Xiaomi's Home)

Source: Xiaomi

Exhibit 15
Mi Robot

Source: Xiaomi

INSEAD — The Business School for the World®

Mi Band ②

Fitness, heart rate and sleep tracker
OLED display, view time, step count, heart rate
ADI accelerometer and optical heart rate sensor
Upgraded pedometer algorithm, hypoallergenic silicone band
20-day battery, IP67 water resistant

Phone unlocking

No fingerprints, no passcodes.
Mi Band 2 unlocks in an instant.

Source: Xiaomi

Exhibit 17
Floor Mopping Robot by

Smart Toilet Seat by

TINYMU

Air Purifier and Air Conditioner by

smartmi

Sources: Roborock, TinyMu & Smartmi