



## 筆路藍縷的前鋒

## 達新工業與亞洲光學

## Taking Offshore Production to Myanmar: Case Studies

## 走過制裁危機的達新

## Case One: Tah Hsin Industrial

1990年代，緬甸曾是全球成衣、製鞋業者的大本營，連同日本、韓國、新加坡等外商，至少聚集了千家以上，其中台商就高達數百家。1999年進軍緬甸的達新工業，也看中當地的廉價勞工而決定進駐設廠。

達新業務管理協理簡久庫指出，1990年代初期，達新相繼在大陸福建與越南設廠後，就預見兩地未來的工資上漲及缺工趨勢，積極另闢新的生產基地，最後才在老客戶日本三井集團的引薦下，落腳由三井開發的明格拉洞工業區。

達新也曾評估在柬埔寨設廠的可行性，「但當時柬埔寨處處是荷槍實彈的軍人，讓人不寒而慄；反觀緬甸雖是軍政府統治，街上卻少見軍人，治安良好且人民和善，順理成章成為投資首選。」簡久庫說。

1999年，達新成為台灣第一家以港商名義至緬甸

In the 1990s, Myanmar was the global hub of garment and footwear manufacturing with over a 1000 foreign companies—including several hundred from Taiwan alone. Drawn by cheap labor, Tah Hsin set up its operation there in 1999.

In the early 1990s, Tah Hsin set up factories in China's Fujian Province and Vietnam. But according to Weisner Jiaan, VP of sales management, the prospect of rising wages and a lack of labor soon started causing problems in these regions. In response, the company began searching for a new production base, and as the result of an introduction through Japan's Mitsui Group, they finally settled on Myanmar's Mingaladon Industrial Park.

In 1999, Tah Hsin became Taiwan's first listed company to invest in Myanmar (even though at the time they were registered in Hong Kong), with capital of around US\$13.5 million. At the time, even university professors in Myanmar earned an average monthly salary of a mere US\$20-30, not to mention average laborers, so the country offered possibly the cheapest workforce available in regions where Taiwanese business was investing.

But the good times were shortlived. Around 2003, as a protest against Myanmar's military-dominated dictatorship,

投資的上市公司，累計資本額達1,350萬美金。而彼時緬甸的大學教授，平均月薪才約合二、三十塊美元，堪稱是台商進軍世界版圖中人力成本最低廉的國家。

然而，好景不常，2003年後，為了反制緬甸軍政府的專政，歐美實施強硬的經濟制裁，禁止「Made in Myanmar」的貨品進口，引發了外資大逃亡潮，挺不過歐美撤單風暴的台資成衣廠，只好紛紛作鳥獸散、撤離緬甸。

還好達新得到日本三井的支持，以開發日本市場的策略，因應無法出口至歐美的危機；再加上亦可和集團內部的大陸廠及越南廠調度訂單，總算順利走過低潮。

今年開始，順應緬甸的民主改革，歐盟已暫時開放緬甸的貨品進口，達新也樂觀預估會有「翁山蘇

Europe and the US enforced tough economic sanctions on the nation, with a ban on imports of "Made in Myanmar" goods, triggering the mass exodus of foreign capital. Taiwanese-owned garment factories also had to retreat.

Fortunately, with Mitsui's support, Tah Hsin aimed at developing the Japanese market rather than exporting to Europe or the US, and also were able to partake in some of the work won by the company's other factories in mainland China and Vietnam. So eventually Tah Hsin made it through the difficult times of economic sanctions.

Since last year, in response to democratic reform in Myanmar, the EU has opened up imports of Myanmar goods. Tah Hsin predicts that opportunities will flow from Aung San Suu Kyi's prominence—European customers may begin asking for "Made in Myanmar" products as the country moves gradually toward democracy and its image improves.

Tah Hsin survived the calamity of economic sanctions with today, a huge increase in employee numbers from 600 to 1600, and 39 production lines. Except for Wednesdays and Saturdays, overtime is necessary to meet the demand. Products range from

緬甸擁有近6,000萬名的廉價勞力，是全球代工業者眼中的聖地，

一旦外商引領企盼的《外人投資法》正式公布施行，必然有為數龐大的製造業者搶進。

其實早在十餘年前，台灣即有達新工業與亞洲光學等兩家上市公司前進緬甸。

前者曾遭歐美經濟制裁緬甸的風暴波及；後者則是仰光第一家，也是目前唯一一家的外資電子廠，他們的經營經驗，對後繼者來說有極高的參考價值。

*Myanmar, a nation with a labor force of around 60 million low-paid workers, is becoming a sort of "holy land" for global outsourcers. A host of international manufacturers are waiting for the country's amended Foreign Investment Law to take effect to move into the nation.*

*As early as a decade ago, in fact, two listed Taiwanese companies—Tah Hsin Industrial Corporation and Asia Optical—were already putting capital into Myanmar, and have since become valuable models for more recent investors.*

*Asia Optical remains the first and only foreign electronics manufacturer in Yangon (formerly Rangoon), while Tah Hsin, hit badly by past US and European economic sanctions against Myanmar, is currently thriving.*

姬商機」——部分歐洲客戶在緬甸走向民主後，可能指名要求「Made in Myanmar」的商品。

挺過制裁危機的達新，如今員工人數已由600人擴編至1,600人，生產線有39條，員工除了周三、周六外，其餘時日多需加班以因應趕貨需求；產品則從日本小學生的塑膠雨衣，到每件動輒新台幣數千元的高級防寒衣、風衣、雨衣等，規模已超過中國大陸及越南廠，成為達新海外最大的生產基地，去年營收則高達新台幣2.9億元。

然而，緬甸持續上漲的工資，以及日益抬頭的勞工意識，都是未來的隱憂。

達新緬甸廠總經理陳武耀坦言，明格拉洞工業區的成衣廠，7月份才經歷罷工風波，經勞資協商，達新最後調薪15~17%。目前員工的基本工資（月薪及 inexpensive plastic raincoats for Japanese elementary school students, to premium items such as jackets and raincoats worth several thousand NT dollars each. The scale of the Myanmar operation has now surpassed those of mainland China and Vietnam: with revenue of around NT\$290 million in 2011, it has become Tah Hsin's largest offshore production base.

However, rising wages and a growing awareness of labor rights are creating concern for the company's future in Myanmar.

Chen Wuyao, general manager of Tah Hsin's Myanmar plant, states that garment factory workers in Mingaladon Industrial Park went on strike in July this year, finally negotiating for a 15-17% wage increase. Tah Hsin's minimum monthly wage including overtime is currently around US\$100.

In addition, the appreciation of the local currency (the kyat) has added another challenge for export-oriented companies like Tah Hsin. Fortunately, Myanmar still has an advantage with its cheaper workforce. And when the US lifts import restrictions completely and grants tariff preferences, the nation's economic outlook will become even brighter. "In response to market projections, we are preparing to expand our production facilities in the region," says Chen. □

加班費)已達100美元。

此外，緬幣上漲的升值壓力，也讓出口導向的達新頭痛不已。幸而現階段的緬甸尚擁有勞工優勢，一旦美國完全解除進口限制，又給予關稅優惠，則前景仍相當看好。「因應未來的市場需求，達新也會做好擴充生產線的準備。」陳武耀說。 □



擁有1,600名員工的達新緬甸廠，是該公司海外的最大生產基地。  
With 1600 employees, the Tah Hsin plant in Myanmar is the company's largest offshore production base.



## 仰光首家外資電子廠亞洲光學

成立31年的亞洲光學，目前是全球最大的光學鏡片製造商，旗下有16個事業部門，

產品線從光學元件(包括透鏡、鏡頭組、濾光片等)、雷射測距儀到顯微鏡、照相機等應有盡有。

為了維持企業的競爭力，亞光持續投入更高階的光電、鍍膜技術研發，同時也需龐大的生產力支援，以因應最初階的鏡片研磨工作。

年輕勞工既多，工資又低廉的緬甸，自然就成為亞光在大陸、菲律賓以外的設廠首選。

2003年3月，亞光在明格拉洞工業區的廠房啓用，包括曾任緬甸總理的欽紐、日本大使，以及各界政商代表皆來祝賀，顯見緬甸官方對亞光的重視。

令人好奇的是，2003年不是歐美啓動經濟制裁、外商大舉逃亡之際，亞光為何反向操作？原來緬甸廠生產的所有光學元件，主要是供應亞光其他廠的加工運用，意即緬甸廠等於是亞光企業內部上游供應鏈的一環。

沒有讓人提心吊膽的出口紛擾，反而更能專心投入生產——今日來到亞光緬甸廠，只見潔淨寬敞的廠房與忙碌的生產線，員工人數近5,000人，日產25萬枚鏡片和8,000套鏡頭，已是仰光當地規模數一數二的外資廠房。

要管理這麼大的工廠並非易事，特別是在緬甸勞工意識已逐漸抬頭的今日，亞光的工廠經營即以提供良好的工作環境，贏得員工認同。

亞光董事吳淑品說，亞光採三班制作業、免費供應員工食宿(一日四餐)，廠房內還設置空調，是目前仰光唯一設有空調的工廠。

「若把免費食宿計入，員工的平均月薪約可達120美元。」她解釋，包吃包住對員工來說非常重要，因為很多緬甸家庭一個月都吃不到一頓肉，有的甚至還缺水缺電；此外，亞光更貼心設置了佛堂，方便篤信佛教的員工禮佛。

正因為提供員工安定的生活環境，亞光的員工流動率極低，而且從來沒有罷工困擾。

值得一提的是，亞光也充分落實「幹部在地化」

生產各式光學鏡片的亞光緬甸廠，具備研磨到鍍膜的完整生產線。(上圖)檢測員正在檢測鏡片的品質。

Asia Optical's plant in Myanmar has a complete production line from lens grinding to coating, producing a range of optical lenses. Lenses are inspected for imperfections at Asia Optical's Myanmar plant.

的制度。草創初期，即派遣71名大陸籍幹部擔任開山元老，先由這群「陸幹」訓練緬甸華僑成為「華幹」，再由他們傳授經驗給緬甸員工，如此一層層地擴展出去。

吳淑品指出，緬甸廠的外籍員工比例僅占1.5%，幹部在地化不但可充分運用當地人力，又能提供當地員工升遷願景，並降低文化隔閡。

放眼未來，緬甸的情勢可望轉佳，亞光也不排除未來直接出口產品至歐美的可能。這家洞燭機先的企業，更早在仰光地價狂飆前，預先在明格拉洞工業區承租了好幾塊地，以因應未來擴廠的需求。

每逢交班時刻，亞光偌大的廠區員工總是精神抖擻地迴盪著「加油，今天一定要完成目標產量！」口號，「帶人要帶心」，正是亞光成功生根緬甸的關鍵。 □



## Case Two: Asia Optical

Established 31 years ago, Asia Optical is Yangon's first foreign electronics factory. Currently the world's largest manufacturer of optical lenses, the company has 16 operating divisions with products ranging from optical components (lenses, camera lenses and filters) to laser rangefinders, microscopes and cameras.

To remain competitive, they have invested heavily in technological R&D in areas such as optoelectronics and lens coatings. But at the same time, the company retains the need for a substantial labor force mainly for grinding lenses.

Myanmar, with the clear advantage of abundant young labor and low wages, was the first choice for Asia Optical's expansion to supplement operations in mainland China and the Philippines.

Their plant in Mingaladon Industrial Park was opened in March 2003 at a formal ceremony attended by Myanmar's former prime minister Khin Nyunt and the Japanese ambassador, as well as government and business representatives from various sectors. The government clearly values the company's investment in Myanmar.

It may seem strange that Asia Optical chose a different path

from other foreign companies which withdrew their capital when Myanmar came under economic sanctions in 2003. The reason is simple. The components produced in the Myanmar factory were used mainly to supply Asia Optical's other plants, so the Myanmar operation was part and parcel of the company's internal supply chain. Without concerns about exporting, the Myanmar plant was able to focus on maintaining steady production. Today when people visit the plant, they see busy production lines operating in a clean and spacious working environment. The plant employs nearly 5000 people, produces 250,000 lenses and 8,000 sets of camera lenses daily, and has grown into one of the largest foreign operations in Yangon.

Managing such an enormous plant is not easy, especially today when Myanmar workers are becoming increasingly aware of their rights. But Asia Optical is proud of its reputation and is generally recognized by its employees as providing a healthy working environment.

One of Asia Optical's directors, Iris Wu, says that the plant in Myanmar provides free accommodation and meals (four meals a day) for employees, and boasts air-conditioned facilities. In fact, the plant is currently the only one in the city that has air-conditioning.

"If the free accommodation and meals are put into the equation, the average monthly salary of employees comes up to about US\$120." Wu explains how important it is for the workers to have free bed and board as many Myanmar families are unable to afford meat, and some even lack water and electricity at home. The plant has also set up a shrine where devout Buddhist employees can worship.

Asia Optical has also implemented a policy of promoting local employees to senior positions. In the initial stages, Asia Optical brought 71 senior personnel from mainland China to manage the Myanmar factory and train local ethnic Chinese workers to become team leaders, who were able to pass on their skills to other locals.

Wu points out that foreigners make up only 1.5% of the total workforce at the plant in Myanmar. Assigning management responsibilities to local workers not only makes full use of local manpower, but also provides promotion opportunities for local employees, thereby reducing cultural barriers.

Looking to the future, which for the moment is looking quite rosy, Asia Optical may be able to export products directly to Europe and the US. In fact, acting before prices skyrocketed, they have leased several pieces of land in Mingaladon Industrial Park to meet the needs of future expansion.

"Go for it! We need to meet our quota!" As a shift begins, calls like this can be heard echoing around the factory where workers seem to be brimming with energy. Care for their workers is a key concept of Asia Optical's management philosophy, and one which has allowed the company to take solid root in Myanmar. □

(Lin Hsin-ching/photos by Chuang Kung-ju/  
tr. by Geoff Hegarty and Sophia Chen)