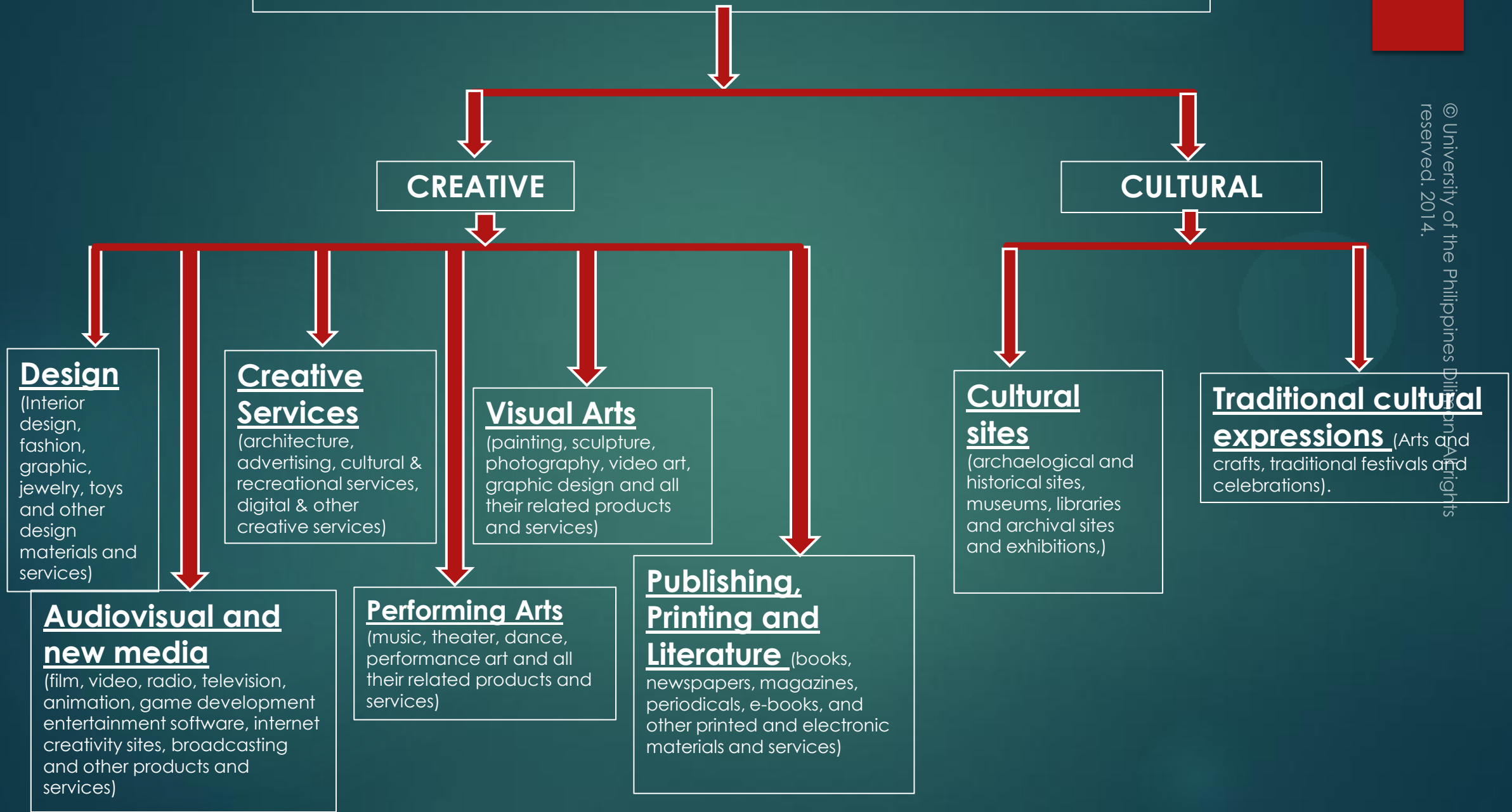


Preliminary Survey of the Philippine Creative and Cultural Industries; An Intercollege Research Agenda for the Establishment of the Proposed UP Sentro para sa mga Industriyang Likha at Kultura (UP SILK) and the National Arts Complex at UP Diliman

# The Creative & Cultural Industries



# The Research Clusters

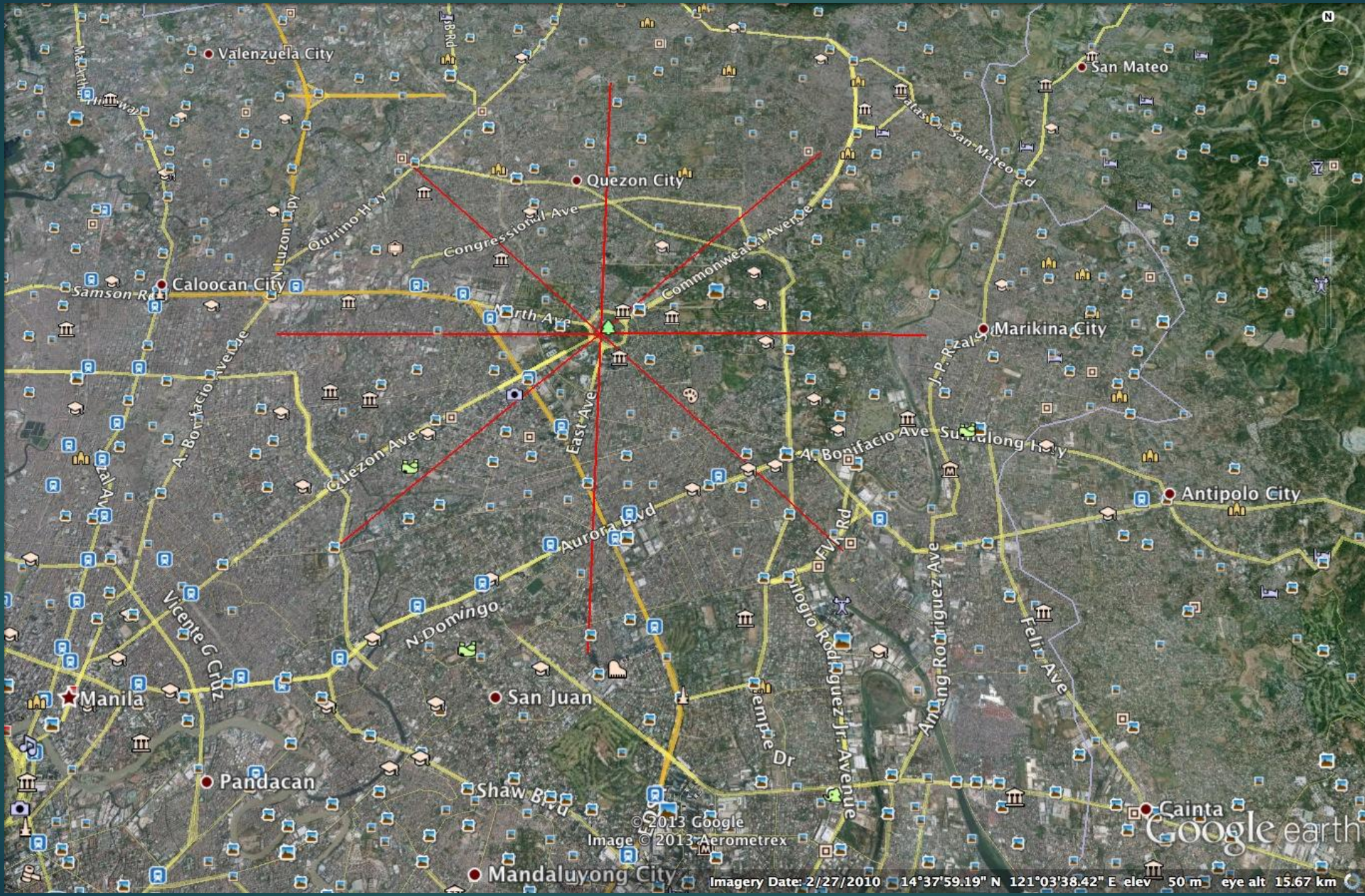
```
graph TD; A[The Research Clusters] --> B[Publishing, Printing and Literature, and Audio-Visual and New Media Arts.]; A --> C[Visual Arts and Architecture and the Allied Arts.]; A --> D[Music and the Performing Arts.]
```

**Publishing, Printing and Literature, and Audio-Visual and New Media Arts.**

**Visual Arts and Architecture and the Allied Arts.**

**Music and the Performing Arts.**

# SILK SURVEY MAP



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# SILK SURVEY AREAS

## To the East

Old Capitol Site, Teacher's Village East, UP Village, UP Diliman campus, Krus Na Ligas, Pansol, Mirian College/Ateneo de Manila University, Barangka, Tañong along Riverbanks Drive;

## To the West

North Triangle/Trinoma, Veteran's Memorial Medical Center, SM North, Bagong Pag-Asa, Phil-Am Village, Veteran's Village, Project 7, Bungad, Santo Cristo, San Antonio, Bago Bantay, Ramon Magsaysay, Pugad Lawin, eastern Balintawak, EDSA past corner Victoneta T.M. Street;

## To the North

Vasra, UP Technohub/ Arboretum, New Era, Culiat, Pasong Tamo; the North

## To the South

City Hall, Teacher's Village West, East Triangle, Central, Pinyahan, Malaya, West Kamias, E. Rodriguez, Araneta Center, Socorro, Cubao north of Main Avenue, Dioquino Zobel, Kamuning, Pinagkaisahan, Immaculate Concepcion, Mariana, Kaunlaran, San Martin de Porres, Horseshoe;

## To the Southwest

Centris, Manila Seedling Bank, West Triangle, South Triangle, Laging Handa, Obrero, Paltok, Nayong Kanluran, Santa Cruz, Paligsahan, Roxas, Mariblo, Paraiso, San Francisco del Monte and Del Monte east of Roosevelt Avenue, EDSA corner Dr. Garcia Sr. Street;

## To the Northeast

Commonwealth Avenue from Philcoa to corner Feria Street, Balara Filtration Plant, PAGASA Compound, Ayala Heights, Matandang Balara, Capitol Hills, Tumana;

## To the Northeast

Commonwealth Avenue from Philcoa to corner Feria Street, Balara Filtration Plant, PAGASA Compound, Ayala Heights, Matandang Balara, Capitol Hills, Tumana;

## To the Southeast

Sikatuna, East Kamias, Malaya, Botocan, Quirino 2-A, Quirino 2-B, Quirino 2-C, Quirino 3-B, Project 2, Project 3, Duyan-duyan, Amihan, Silangan, Mangga, Tagumpay, Escopa I-IV, Project 4, Milagrosa, Industrial Valley, Katipunan in front of Quirino Medical Center; and

## To the Northwest

Project 6, Project 8, Mindanao Avenue corner Landcom Street, Tandang Sora, Sangandaan, Tandang Sora Avenue corner University Lane.

# SURVEY INSTRUMENTS

## UP SENTRO PARA SA MGA INDUSTRIYANG LIKHA AT KULTURA (UP SILK) (Revised Survey Form)

### A. REFERENCE SECTION

1. Area	2. Code
3. Date	4. Respondent
5. Gender/Age	
6. Home Address	7. Industry type
8. Company (if any)	9. Office Address/Contact Details
10. Referred by:	

### B. BACKGROUND

11. Education Level Achieved	12. School	13. Inclusive Dates	14. Length of Stay in Industry
15. Training Program Undertaken	16. Details		
1. Name of Trainor	2. Training Institution	3. Address	4. Inclusive Dates

### C. INDUSTRY DETAILS

Nature of Work (Describe the nature of you/your group's work/your activities/functions. Who are the people/groups in your area that perform similar activities? How are they similar to/different from you/your group? What is the character of your projects?)

17. Occupation (Please describe in detail)
18. Name of Persons other than yourself involved in the same area of work that you do
19. Names of Groups/Corporations/Associations/Organizations involved in the same area of work that you do.
20. Specific/Unique character of your projects (please describe)
Quantity Produced, 2011-2012 [What is the structure of your organization? Who are the people involved that help you in running the day to day operation? What functions do they perform? What service do they perform for the Community around them? What is the character of your clients? Where do they come from? Sectors (professional, Students, journeymen) location, etc]
21. Structure of Organization (single proprietorship, limited partnership, publicly listed corporation, etc.)
22. Number of people involved
23. Nature of Service (entertainment, education, marketing, management, etc.)
24. Nature of Client (kindly describe in detail)

1

3. Specific/unique character of respondent's projects
4. Nature of service (please check as many as will apply)
<input type="checkbox"/> entertainment <input type="checkbox"/> education <input type="checkbox"/> marketing <input type="checkbox"/> public service <input type="checkbox"/> others (please specify) _____
C. Actual Income Generated
5. Type of income generated (please check as many as will apply)
<input type="checkbox"/> revenues from sales <input type="checkbox"/> revenues from commission <input type="checkbox"/> income from investments <input type="checkbox"/> others (please specify) _____
6. Estimated income in 2012
7. Estimated amount of losses, if any, in 2012

Thank you!

2

# Types of Information

```
graph TD; A[Types of Information] --- B[Structure of Organization]; A --- C[Profile of business]; A --- D[Nature /Type of income]
```

Structure of Organization

Profile of business

Nature /Type of income

# REPORT OF DATA (Publication, Printing & Literature)

## UP SENTRO PARA SA MGA INDUSTRIYANG LIKHA AT KULTURA

### Cluster A: Publishing Houses & Printing Presses

INITIAL DATA AND OBSERVATIONS FROM SURVEY FORMS as of DECEMBER 30, 2013.

#### I. Name and Profile of Respondents: 21 printing presses

The respondents' company position vary from owner/proprietor to marketing manager, graphic artist, human resource officer, etc. (Please see table below)

Publishing House/ Printing Press	Name	Position
1. Abiva Publishing House, Inc.	Cora A. Sapo	Marketing Manager
2. Aldron Data Printing Services	Florencia B. Generoso	Head Supervisor
3. Central Book Supply, Inc.	Marie V. Naval	Human Resource/ Administrative Manager
4. C & E Publishing, Inc.	Mark Flores	General Manager - Basic Education Divisio
5. Claretian Communications Foundation, Inc.	Robert U. Laurio	Production Manager
6. Digital Switchover, Inc.	Nora Anajao	Administrative Manager
7. Ibon Foundation, Inc.	Cristina P. Dumlaog	Administrative & Finance Department Head
8. Irene Printing Services	Irene R. Guiguig	Owner
9. Maca Printing Press	Efren R. Maca	Owner
10. Marojeles Printing Press	Michael Angelo R. Lazaro	Graphic Artist
11. New Century Books & General Merchandise	Zita D. Cruz	Human Resource Officer
12. New Omori Printing Press	Augusto F. Buenaventura	Proprietor
13. Reynan Printing Services	Richard M. Mabaro	Graphic Artist
14. Ronan Printing Services	Ramon Pacquing	Operations Manager
15. RRC Printing Services	Rommel Gelua	Employee
16. San Antonio di Padova Print & Publishing	Emmanuel C. Flores	CEO/Past President, Philippine Printing Technical Foundation
17. Sign Printing Services	Shirley Bersabe	-
18. Southern Voices Printing Press	Zenaida Garduce	Operations Manager
19. Vanessa Plana Printing Services	Vanessa Plana	Manager
20. VJ Graphic Arts Inc.	Daisy Dizon	Accountant
21. 24K Advertising	Elmer Palana	Supervisor

#### II. Profile A. TYPE OF EMPLOYEES

1

SILK Project: Publishing Houses & Printing Presses 30December2013

- The printing presses have the following category as defined under the Department of Trade and Industry's Small and Medium Enterprise Development (SMED) Council Resolution No. 01 Series of 2003:

Category	Number of Employees	Number of companies
Micro Scale Enterprise	1 – 9	12
Small Scale Enterprise	10 – 99	7
Medium Scale Enterprise	100 – 199	1
Large Scale Enterprise	200+	1

- Additional observations:
  - Seven printing companies have 1 – 10 part-time regular employees.
  - Eight companies maintain 2 – 24 contractual or part-time employees, except for San Antonio di Padova Print and Publishing which hires more than 100 persons on a project/ contract basis. The Claretian Communications Foundation, Inc. has 6 – 8 on-call workers.
  - Vanessa Plana Printing Services has no full-time employee, only 5 regular part-time.

#### B. NATURE OF CLIENT

- Their clients consist of public and private institutions, organizations, and individuals. The largest costumers are schools (both public and private from grade schools to colleges and universities) and private companies (such as hospitals, food businesses, banks, and hardware stores). Educational institutions employ the services of printing presses primarily for publications and corporations for office, marketing, and purchasing documents.
- Some provide services for Philippine schools overseas and offshore companies.
- Other customers are:

PUBLIC	PRIVATE	ORGANIZATIONS	INDIVIDUALS
Government agencies	Embassies	Non-government organizations	Professors
Government organizations	Bookstores	People's organizations	Students
	Libraries (special and corporate)	Medical associations	Parents
	Motorcycle company	Student organizations	High-profile personalities

#### C. STRUCTURE OF ORGANIZATION

- 13 printing houses are owned by a single proprietor, 7 are corporations, and 1 a foundation.
- Ibon Foundation, Inc. adds that it is a non-government, nonstock, and nonprofit organization.

#### D. 2012 NET INCOME

- No respondent has declared income loss in 2012. Aside from San Antonio di Padova Print and Publishing's break-even account in terms of revenues, other companies had a positive annual net income in 2012 as shown in the following table:

Net Income	Number of Companies	Average Annual Net Income
10,000 – 100,000	3	83,333.33

2

SILK Project: Publishing Houses & Printing Presses 30December2013

100,001 – 300,000	4	213,380.29
300,001 – 500,000	2	462,721.58
500,000 – 1,000,000	4	702,968.18
1,000,001 – 10,000,000	3	3,726,000
10,000,001 – 50,000,000	1	12,500,000
50,000,001 – 100,000,000	1	80,000,000
More than 100,000,000	1	150,000,000

#### 2. Additional Observations:

- Two micro-scale and four small-scale enterprises had an annual net income of over one million.
- C&E Publishing, Inc., the only large-scale enterprise among the initial respondents, had the highest net income in 2012 which amounted to 100 – 200 million.
- Respondent from Adarna withheld their income data due to confidentiality reasons.

#### E. TYPE OF INCOME GENERATED

- 20 respondents obtained their earnings from sales. Irene Printing Services gained revenues from investment.
- In addition to sales, 4 printing houses got income from various sources such as commissions, investments, rentals, and grants.

#### F. NATURE OF BUSINESS

- Most of the companies (15 out of 21) give offset printing services. 5 provide digital, 3 for large format, and 1 for silkscreen/ heatpress printing.
- Other indicated services are publishing, importing and selling books, designing, layout, pre- and post-press services, and consultancy.
- Four presses provide more than one printing services.

#### G. LIST OF COMPANY'S PRODUCTS

- 4 companies only print books.
- 17 presses print a combination of materials such as books, magazines, newspapers, annuals / yearbooks, posters, calendars, fliers, and brochures.
- 2 companies focus on printing marketing materials such as calendars, fliers, brochures, and posters.
- Other products listed are newsletters, stampats, e-books, multimedia materials, forms, and receipts.

**ADDITIONAL OBSERVATION:** Most micro and small-scale enterprises expand their services to printing non-educational materials.

#### H. NATURE OF SERVICE PROVIDED

- The main features of provided services are education and marketing with 9 companies stating both as the nature of their business.
- Additional services provided include pastoral formation; NGO research, information, and education; library servicing; and consultancy.

#### I. SPECIFIC/ UNIQUE CHARACTER

3

SILK Project: Publishing Houses & Printing Presses 30December2013



# Initial Observations

- Alienation of artists from the corporate structure of industry as seen in their preference for the underground economy/their desire to remain as free agents/their resistance to guild attempts to professionalize
- Perception of marginalization of artists within an economic system based on the low and unstable valuation of skilled creative labor
- Perception of the punitive character of legal and other government systems that seek to organize and draw creative work into their view based on the experience of individual artists