



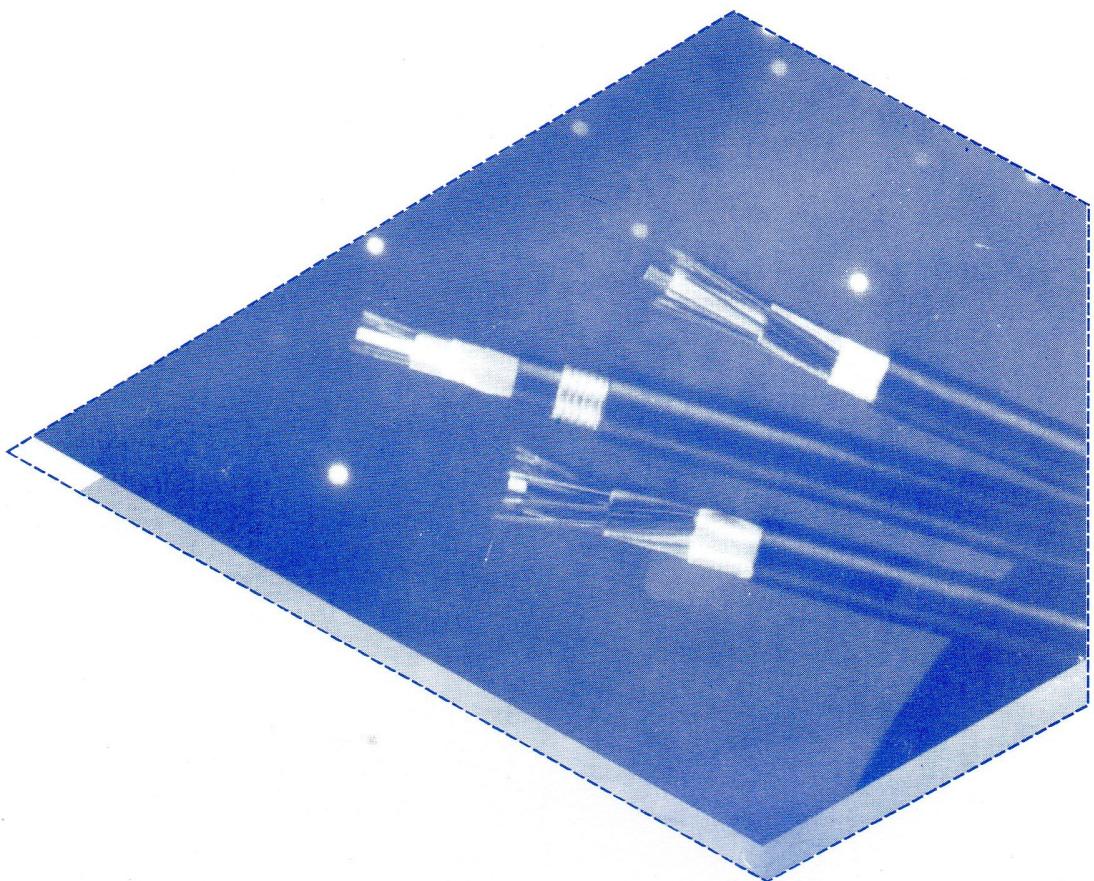
2003 CHAIR'S REPORT

**Federation of International Cable TV
Association of the Philippines**

EUPEN

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FIBER OPTIC CABLES



EUPEN CABLE ASIA, INC.

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INTRODUCTORY REPORT

Where are we now? Where are we going?

Your leadership at FICAP is always aware of its mandate of sheltering the small and medium cable TV operators from the slings and arrows that would threaten their existence, at the same time initiating actions and programs that would help them grow and become profitable.



During 2003, the year we are now reviewing, did we falter in this mission? We say not. If there was some slowing down, blame it on our respect for democracy. We staked the leadership to gain a renewal of confidence from the members and welcomed new faces in the most critical positions. In the continuing fight against the crippling NTC IRR's, we took an early aggressive position of waging a legal battle all the way to the Supreme Court until the FICAP Board dedicated it was not yet necessary.

About the NTC Circular, or big enemies have actually adopted the document as their new version of the dreaded Cable Bill and the Subscribed TV Act of recent times, bringing complaints against small and medium cable operators trying to buck the sky-high programming costs. Our immediate reaction was to initiate concrete action to have the Circular recalled by Malacañang.

The latest developments are that we have a new NTC Commissioner who should be more sincere with us and be able to appropriate our position and plight for survival. And even before that, programmers like Viva, Solar and even Cable Boss have reduced or become more reasonable with their rates to give the small operators a breathing spell. The convergence and the electric pole bills are still pending in Congress.

After the elections, we will continue to find solutions for our problems and seek new opportunities under the old administration-or a new one.

In the meantime, let us be more united. Unity is the key to our survival and success.

May God keep on showering us with his blessings.



ESTRELLA JULIANO-TAMANO
National Chair

Federation of International Cable TV Association of the Phil's. (FICAP)

FEDERATION OF INTERNATIONAL CABLE TV ASSOCIATION
OF THE PHILIPPINES (FICAP)

BICOL REGION GENERAL MEMBERSHIP MEETING

SPONSORS:

PBO

TNRI-MANAGEMENT & DEVELOPMENT CORPORATION (TMDC)
EUPEN CABLE ASIA

OCTOBER 4, 2003

CASA BLANCA HOTEL



Bicol Region General Membership Meeting at Casa Blanca Hotel



Signing and Launching of VOIP (TNRI-TMDC) together with TMDC officers and FICAP officers

Date: July 26, 2003

Venue: ELKS Club, Carintian Plaza, Paseo de Roxas, Makati City



Consultation Meeting of FICAP and MCTOC

September 6, 2003 w/ Estrellita Juliano-Tamano, Andrea del Rosario (VIVA Hotbabe) and Manny Pasia of Blackstone Cable

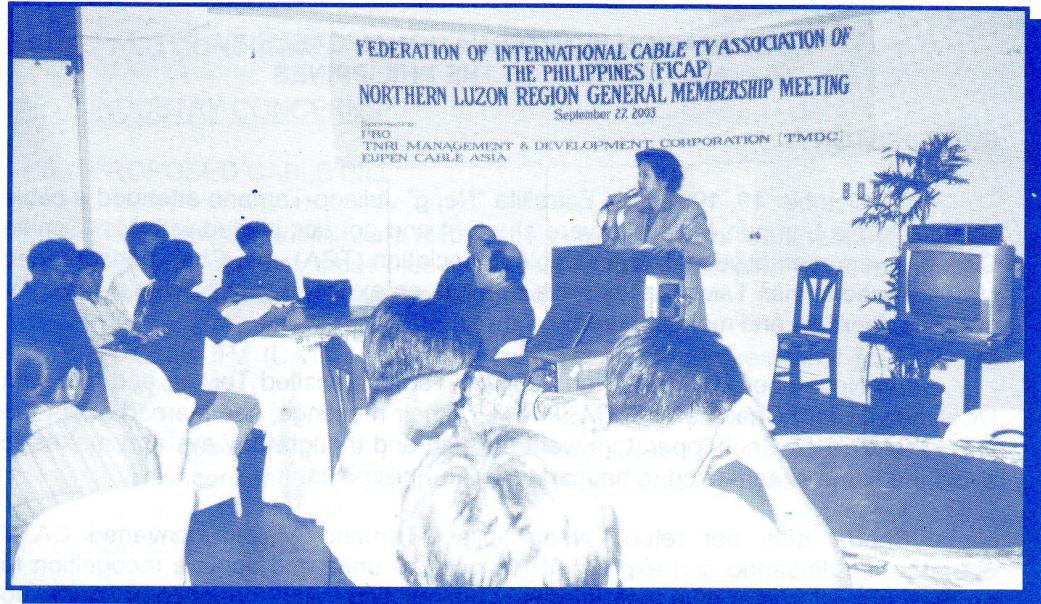
Venue: Grand Regal Hotel, Lanang Davao City



Standing from left: Imelda Naraval, Joaquin Tamano, Joe Delmendo, Atty. Basilio Bolante,
Ruben Cortes
Seated from left: Josie Delmendo, Cecile Dy, Mr. & Mrs. Spencer Kaitz, Estrellita Juliano Tamano,
Samadar Bola



CCTA Convention
Estrellita Juliano-Tamano, Cecile Dy, (Partly Hidden)Joe Delmendo, Joaquin Tamano.



FICAP Northern Luzon General Membership Meeting

September 27, 2003 City Travel Hotel, Baguio City

Atty. Basilio B. Bolante, CCTA Pres., Dennis Mangers, Joe Delmendo, Imelda Naraval, Ruben Cortes, Cecile Dy, Estrellita Juliano Tamano, Josie Delmendo, Samadar Bola, and Imelda Naraval.



CCTA Convention December 2-6, 2003

Standing from left: Atty. Basilio B. Bolante, CCTA Pres., Dennis Mangers, Joe Delmendo ,
Ruben Cortes

Seated from left: Samadar Bola , Cecile Dy, Estrellita Juliano Tamano, Josie Delmendo, Imelda
Naraval

FEDERATION PF INTERNATIONAL CABLE TV ASSOCIATION OF THE PHILIPPINES

BRIEF HISTORY:

On October 19, 1997 Mrs. Estrellita "Neng" Juliano-Tamano attended a cable show in Kuala Lumpur, Malaysia where she met and got acquainted with Ms. Connie Chang, a representative of Taiwan Cable Association (TCA). Ms. Chang encouraged Mrs. Tamano to visit Taiwan and to have a hands-on experience in Taiwan's cable TV systems, facilities and manufacturers.

On November 20, 1997, Neng Juliano-Tamano, visited Taiwan and met with Dr. Jimmy Hsieh, Chairman of TCA. In one of their meetings, she learned about the crisis that Taiwan Cable operators went through and thought of ways and means to avoid the same experienced to happened in the Philippines.

Shortly after her return, Neng Juliano-Tamano, visited convened CATV operators in Mindanao and expressed the need to unite and acquire recognition to properly protect and pursue their interest. This resulted in the formation of Mindanao Cable TV Operators Cooperative (MCTOC) with Neng Juliano-Tamano as Chairwoman on December 13, 1997. At the MCTOC General Membership Meeting in Cebu City on October 24, 1998, Cable operators from Luzon and Visayas were invited to address similar concerns. Recognizing the advantages enjoyed by MCTOC members as a Federation of International Cable TV Association of the Philippines (FICAP). Interim officers were elected. The following month November 16 a general membership meeting was held at Rembrant Hotel Quezon City and a new set of officers were elected. On January 26, 1999, His Excellency President Joseph Ejercito Estrada inducted FICAP officers led by Neng Juliano-Tamano as National Chair, in ceremonies held at Malacañang Palace.

OBJECTIVES:

- To promote the interest of the small and medium Cable TV operators in the Philippines and act as fora for the discussion of the issues affecting the cable industry.
- To provide assistance to members in the sourcing of programs, supplies & equipment both in the domestic and international markets.
- To conduct training and seminars for technical and managerial personnel.
- To act liaison between government agencies and CATV operators.
- To assist government in the formulation of laws and rules covering the industry.

MEMBERSHIP:

CATV operators from Batanes to Jolo comprises the membership of the association. The association accounts for almost 90 percent of the total Cable TV operators in the country.

ISSUES AND CONCERNS:

INDUSTRY CONCERNS

1. PROPOSED CABLE BILL:

Three new cable bills were filed in the Lower House of Congress. These bills were the same as those filed in the last Congress, which FICAP association opposed due to two basic provisions which are:

- Cable TV (CATV) operators must secure a congressional franchise to operate.
- No cable TV (CATV) operator can cablecast TV programs without the prior consent of the program owner or its representative.

FICAP POSITION:

- Only cable TV (CATV) Companies operating nationally or in two or more regions must secure a congressional franchise.
- Regulations for TV programs and or programmers must be covered by a separate congressional bill.
- The Regional NTC must bolster its field inspection staff so that each Local Government Unit (LGU) with a CATV Station operating in its locality will be inspected at least one every three (3) months to assess sits service delivery quality.
- NTC should not allow more than one CATV operator in a given rural community with a base of not more than four thousand (4,000) subscribers.
- In Urban Community with ten thousand (10,000) subscriber only two (2) CATV should be allowed to operate. Each New CATV station in an urban area should have viability base of five thousand (5,000) subscribers.

The association proposed the immediate deliberation of the CONVERGENCE BILL by both House of Congress. FICAP strongly believes that this bill will be able to address the present market situation.

2. CONVERGENCE BILL:

Some congressman have been very supportive of the association's position with regard to the Convergence Bill as a priority measure. To us members of FICAP, this is a welcome development because this will widen the horizon for us cable TV operators. We will have the flexibility to offer other services in addition to cable TV.

This move by Congress to deliberate on the Convergence Bill does not mean that it will have all positive effect to all cable TV operators. Cable TV (CATV) operators who do not want or do not have the capacity to make adjustment to

cater to the converged products will be put in a bad situation vis a vis those who are preparing for it.

FICAP has been requested by the committee in charge to give our comments and additional inputs regarding some provisions on the bill particularly with reference to cable TV operations. We would like to assure our members that we will do our best to take into consideration the common interest of every member.

3. PROGRAMMING:

TV programs have lately been one of the problem areas for every operator. With the devaluation of the peso versus the US Dollars, our program cost has gone up. FICAP through FICAP Holdings Corp. has been trying to negotiate with program owners. Several meetings were held but the price factor seems to be very elusive.

Lately some program distributors have been coercing NTC to act on their complaints about alleged use of block boxes. They want all cable TV operators to buy their programs even if these are priced way above the prices offered in other Asian countries.

4. POLE RENTALS:

Slowly electric utility companies have been increasing the rates on pole rentals. Meralco even charges 50% of the rate for poles that have not been in use by cable TV operators. During the hearing on the MERALCO franchise FICAP filed an opposition with regard to the practiced of Meralco on pole rentals. This position of FICAP led to the request by some congressmen for the Association to draft a bill regulating pole rental. The FICAP bill has been drafted and will be submitted to Congress in the very near future.

The main features of the FICAP proposed bill are as follows:

- There should be no discrimination in allowing cable TV operators in using poles owned by utility companies.
- There should be affix formula in the computation of pole rental.
- Contracts on Pole rentals should be under the supervision of National Telecommunications Commission.

5. Regular Consultation by NTC:

- NTC must hold a yearly consultation with CATV operators registered with various association to determine the relevance and practicality of NTC policies, rules and regulations.
- Prior to the enhancement of new rules and regulations affecting the operation of CAT stations, NTC must consult the various CATV associations to determine the emerging adverse consequences of such regulations to the industry.

FICAP CHAIR ACTIVITIES FOR 2003

DATE	ACTIVITIES	VENUE
January 4, 2003	Meeting with Joyce Cruz of SFX Productions	Annabel's Restaurant, Tomas Morato, Quezon City
January 10, 2003	Meeting with Albert Velasco of PETEF	Fort Bonifacio, Makati City
March 29, 2003	Philippine Federation of Business Women	53 Coconut St., Valle Verde Pasig City
January 11, 2003	Meeting with Ms. Joyce Cruz of SFX Productions	Starbucks Greenbelt, Makati City
January 16, 2003	PETEF Induction of Officers	Manila B Function Room Shangri-La
January 17, 2003	Meeting with Mr. Albert Velasco of PETEF	Gordo's Café, Makati City
January 21, 2003	Meeting with Mr. Albert Velasco of PETEF	Rack's, Ortigas Center
January 23, 2003	NCCA Meeting	Intramuros, Manila
January 24, 2003	Meeting with Mr. Camacho of Meralco	4 th floor, Technical Services Bldg. Meralco Ave. Pasig City
	Meeting with Mr. Dave Fernando	UCC Café, Podium, Pasig City
	Meeting with Mr. Albert Velasco of PETEF	Via Mare, Eastwood, Libis, Quezon City
January 29, 2003	NCCA Press Conference	Illustrado, Intramuros, Manila
January 30, 2003	ITECC-Convergence Sub-Committee Meeting with NTC	3 rd floor, IDC Bldg. Danny Floro St. cor. C.P. Garcia, Bagong Ilog, Pasig City
January 31, 2003	Meeting with Comm. Armi Jane Borje	NTC Office, Quezon City

FICAP CHAIR ACTIVITIES FOR 2003

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DATE	ACTIVITIES	VENUE
February 13, 2003	NCCA monthly meeting	NCCA Bldg., Intramuros, Manila
February 15, 2003	Meeting with Mr. Velasco of PETEF	Pasku Rest., Ortigas Center
February 18, 2003	Attended the Birthday Party of Gina de Venecia with Pres. Arroyo, Pres. Cory Aquino, Speaker Joe de Venecia, all Congressman and with Mrs. Dy	Heaven, Muntinlupa City
February 19, 2003	Breakfast Meeting with Metro Club	Pasig Room, Estrella St. Makati City
	Launching of NBN World with Mrs. Dy	Inter-Continental Poolside, Makati City
February 22, 2003	MCTOC Meeting	Dynasty Court Hotel, Caravan de Oro
February 24, 2003	Meeting with Joyce Cruz of SFX with Mrs. Dy	Manila Peninsula, Makati City
February 26, 2003	Attended Dream-launching With Tony Boy Cojuangco And Titoy Pardo	CCP Theatre, Roxas Blvd., Pasay City
February 27, 2003	Meeting with Ms. Pauline Pamintuan of EUPEN	FICAP Office, Rm. 1206 Sunset View Towers, Pasay City
March 1, 2003	FICAP General Membership Meeting of Region VIII	D' Leopards CATV Allen Ave., Northern Samar Catbalogan City
March 6, 2003	Meeting with Wenchill of City Neon, Ms. Pauline of EUPEN, and for the bags Mrs. Melanie Foronda	FICAP Office, Rm. 1206 Sunset View Towers, Roxas Blvd., Pasay City

FICAP CHAIR ACTIVITIES FOR 2003

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DATE	ACTIVITIES	VENUE
March 11, 2003	Meeting with NTC, FICAP members and Cable Boss	BIR Road, East Triangle, Quezon City
March 13, 2003	NCCA Meeting	NCCA Bldg., Intramuros, Manila
March 20, 2003	PETEF Breakfast Meeting	Metro Club, Estrella, Makati City
March 29, 2003	Invitation of NTC Region II for Inspirational Message for the Regional CATV Conference	Sky Hotel Restaurant, Pagdaraon, La Union
March 31, 2003	FICAP meeting with Region II	Casa Angela, Tuguegarao City
April 1, 2003	FICAP meeting with Region III	Café Leticia, Cabanatuan City
April 4, 2003	Philcomsat meeting with Mrs. Dizon	Telecoms Monitor Plaza, Gil Puyat Ave., Makati City
April 7, 2003	Taiwan Trade Mission to Southeast Asia 2003	Mandarin Ballroom, Mandarin Oriental, Makati City
April 8, 2003	FICAP officers meeting	Casino Español, Manila
April 10, 2003	Meeting with GMA-7	GMA-7 Office, Luzon City
April 22, 2003	US-AID-AED with Dr. Cecile Latica	8 th floor, R.M. Center Manila
April 23, 2003	FICAP Board Meeting	Casino Español, Manila
May 2, 2003	Breakfast Meeting with Mr. Albert Velasco of PETEF Meeting with Destiny Cable with Elena Lim & Co.	Manila Polo Club Makati City Pasay Rd. Restaurant, Makati City

DATE	ACTIVITIES	VENUE
May 6, 2003	Meeting with Mr. Albert Velasco with VOIP	Pesto Restaurant, Fort Bonifacio, Makati City
May 7, 2003	Bound for Baguio to attend the Cable Congress and Exhibits	Baguio Country Club, Baguio City
May 8, 2003	4 th Cable Congress	Baguio Country Club, Baguio City
May 10, 2003	4 th Cable Congress	Baguio Country Club, Baguio City
May 15, 2003	PETEF "Government Industry Dialogue"	Manila Hall B Makati Shangri-La
May 16, 2003	PETEF "Business Opportunity Forum"	Manila Hall B Makati Shangri-La
May 21, 2003	FICAP Board Meeting	Casino Español, T.M. Kalaw Manila
May 22, 2003	NTC hearing re: Program Content	BIR Road, East Triangle, Quezon City
May 26, 2003	Meeting with Mr. Camacho Vice Pres. of Meralco	Meralco Office, 4 th floor, Technical Services bldg. Meralco Ave., Pasig City
May 27, 2003	Meeting with Mr. Albert Velasco Assistant Vice Pres. of Meralco	Technical Services Bldg. Meralco Ave., Pasig City
May 28, 2003	Committee on Transportation Commission hearing Re: Electric Poles	Room 3 House of Representatives, Batasang Pambansa, Quezon City
May 29, 2003	Meeting with US Embassy Officials	ICT – Business Center Conference Room 25 th floor, Ayala life, FGU Bldg. 6811 Ayala Ave.

FICAP CHAIR ACTIVITIES FOR 2003

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DATE	ACTIVITIES	VENUE
June 19, 2003	NCCA Meeting Meeting with Atty. Concha	NCCA Bldg., Intramuros, Manila Sulo Hotel, Quezon City
June 21, 2003	NTC - Western Visayas Forum	Sarabia Manor Hotel, IloIlo City
June 27, 2003	FICAP Board meeting	Casino Español, T.M. Kalaw, Ermita,
June 30, 2003	Voice Over IP Presentation- TNRI-TMDC	34 th floor RCBC Plaza Cor., Ayala and Buendia, Makati City
July 1, 2003	FICAP Meeting Re: loans with Mr. Vance Schaefer	Casino Español, T.M. Kalaw, Ermita Manila
July 3, 2003	Meeting with Mr. Vance Schaefer With Mr. Ruben Cortez and Mrs. Cecile Dy	Washington Tower, Asia World, Parañaque City
July 4, 2004	Meeting with Mr. Angelo Que and Mr. Escalona	Hotel Intercon, Manila
July 17, 2003	Meeting with TNRI-TMDC Meeting with Joyce Cruz	2402-A RCBC Plaza, Gil Puyat Ave., Makati City Starbucks, Greenbelt, Makati City
July 18, 2003	Meeting at TNRI-TMDC	2402-A RCBC Plaza, Gil Puyat Ave., Makati City
July 2, 2003	"OPLAN: NONA Meeting with Engr. Zerrudo, Mr. Cinense, Mr. Cortez, Estrellita Juliano- Tamano, Mr. Paynor, Mr. Silloriquez, Mr. Lim, Engr. Puyo	FICAP Office, 1206 Sunset View Towers, Roxas Blvd., Pasay City
July 24, 2003	NTC Celebration Day	NTC Bldg., BIR Road, Quezon City
July 26, 2003	Signing and Launching of VOIP with TNRI-TMDC	Elks Club, Corinthian Plaza, Paseo de Roxas, Makati City

FICAP CHAIR ACTIVITIES FOR 2003

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DATE	ACTIVITIES	VENUE
July 28, 2003	Meeting with Gen. Odi Chairman Recall Pager	Starbucks, Greenbelt 3, Makati City
July 29, 2003	Meeting with TNRI-TMDC Meeting with Mr. Vic Del Rosario, Estrellita Juliano- Tamano, Mrs. Cecile Dy, Mr. Ed Paynor, Engr. Elmer Puyo	RCBC Plaza, Gil Puyat Ave., Makati City 7 th floor, Tektile Tower, Ortigas Center, Pasig City
July 30, 2003	Meeting with Ms. Elena Lim and Mr. Gary Laureano	Marigold Room, Hai Shin Lon Restaurant, Pasay Road, Makati City
July 31, 2003	Meeting with Ms. Joyce Cruz of SFX Productions	Starbucks Greenbelt 3, Makati City
August 4, 2003	Meeting with Congresswoman Imee Marcos with Estrellita Juliano-Tamano, Mr. Ed Paynor, Mr. Chito Bautista, Mr. Florante Pascual, Mr. Moises Lim, Mr. Alvin Ty	Lolo Mao Podium ADB Ave., Ortigas, Pasig City
August 6, 2003	Meeting with Destiny Re: Technical Group Engr. Romy Zerrudo, Mr. Ruben Cortez	Solid House Bldg., Pasong Tamo Extension, Makati City
August 7, 2003	TMDC meeting with Mr. Danny Napalinga	Rm. 1206 Sunset View Towers, Roxas Blvd., Pasay City
August 8, 2003	Meeting with Mr. Gary Lauriano, Ms. Joyce Cruz	Starbucks, Greenbelt 3, Makati City
August 18, 2003	2 nd hearing of NTC Re: IRR	NTC Conference Room, BIR Road East Triangle, Quezon City
August 20, 2003	NCCA Special Meeting Meeting with Mr. Vic del Rosario Meeting with Ms. Salvi Casino Former Producer of ANC	NCCA Bldg., Intramuros, Manila 6 th Flr, PSE, Ortigas Centre, Pasig City Podium, Ortigas Centre, Pasig City

FICAP CHAIR ACTIVITIES FOR 2003

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DATE	ACTIVITIES	VENUE
August 28, 2003	Meeting with Comm. Armi Jane Borje	NTC Conference Room BIR Road, Diliman, Quezon City
August 29, 2003	Meeting with Mr. Vic del Rosario	6 th Floor, PSE, Ortigas Centre, Pasig City
September 6, 2003	MCTOC/FICAP Regional Consultation Meeting	Grand Regal Hotel, Lanang, Davao City
September 11, 2003	NCCA Meeting	Intramuros, Manila
September 18, 2003	FICAP Board of Trustees Meeting	Casino Español, T.M. Kalaw, Ermita Manila
September 20, 2003	FICAP- Visayas Meeting	Waterfront Hotel, Cebu City
September 25, 2003	Cocktail meeting with Mabuhay Satellite	The Fort, Forbes Town Center, Global City, Makati
September 27, 2003	Northern Luzon Regional Consultation meeting	City Travel Hotel, Baguio City
October 4, 2003	Bicol Regional Meeting	Casablanca Hotel, Legazpi City
October 6, 2003	Meeting with Ms. Aida Miranda Commercial Attaché of US Commercial Service	27 th floor F Ayala Life FGU Center, Makati City
	Meeting with Mr. Gary Lauriano with United Architects & Interior Design Association	Starbucks, Greenbelt 3, Makati City
October 9, 2003	NCCA Meeting	NCCA Bldg., Intramuros, Manila
October 14, 2003	NCCA opening Program for Architecture & Dance Module	NCCA Bldg., Intramuros, Manila

FICAP CHAIR ACTIVITIES FOR 2003

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DATE	ACTIVITIES	VENUE
October 27, 2003	FICAP Regional Chairs Meeting re:IRR	Casino Español, T.M. Kalaw Manila
October 29, 2003	Meeting with lawyers with Atty. Cantara, Mr. Rey Cinense, Mr. Napoleon Foronda, Atty. Bolante, Armando Merilleno	Sagittarius Bldg. Salcedo Village, Makati City
November 5, 2003	FICAP Emergency Board Meeting	Casino Español, T.M. Kalaw, Manila
November 7, 2003	Meeting with Ms. Mary Ann Reyes of Philippine Star	Starbucks, Greenbelt 3, Makati City
	Meeting with Justice Elvinas/Manila Bulletin	Parañaque Residence
November 8, 2003	FICAP/MCTOC Regional consultation meeting	Lantaka Hotel, Zamboanga City
November 10, 2003	Meeting with Kapunan-Roco law Office and Tanjuatco- Tayag Law Office Estrellita Juliano-Tamano, with Mrs. Cecile Dy, Mr. Armando Merilleno, Mr. Ed Paynor, Atty. Basilio Bolante	Emerald Place, Ortigas Centre, Pasig City
November 18, 2003	Hearing House Bill 131 Recognizing NTC 7 its Appropriate funds with Atty. Bolante & Dindo Talplacido RVM- Congress	House of Representatives, Batasang Pambansa Complex, Quezon City
November 25, 2003	Hearing House Bill 4369 Re: Use of Electric poles in congress with Ed Paynor	House of Representatives, Batasang Pambansa Complex, Quezon City
November 27, 2003	FICAP Board Emergency Meeting	Casino Español, T.M. Kalaw, Manila
December 1, 2003	Bound for US to attend CCTA with Estrellita Juliano-Tamano, Mrs. Cecile Dy, Mrs. Samadar Bala, Atty. Basilio Bolante, Mr. Ruben Cortez, Mr. Joaquin Tamano, Mrs. Imellda Naraval, Mr. Joe Delmendo and Mrs. Josie Delmendo	Anaheim Convention Center, Anaheim, California



ICE
OCEAN
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