



Lessons from Frankenstorm: Investing for Future Power Disruptions

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DESCRIPTION

The world has been brought to its knees in recent years due to an increased amount of hurricanes, tsunamis and earthquakes which collectively have left tens of millions without power and derailed economic growth in the process. However, today weather is not the only threat to massive power loss. It's time to fight back before energy weaknesses and instabilities from disruptive weather patterns cause financial chaos around the world through cyberwarfare. In *Lessons from Frankenstorm*, you'll learn how to fight back.

Overview: A look back at recent events (Fukushima, India blackout, Sandy here in the U.S., August 2003 blackout in Northeast U.S., etc.). Set up the case that something needs to be done, especially with warming temperatures (2012 was the hottest year on record).

What are threats? Focus here is on weather (temperatures, rising tides, global warming, dwindling water supplies which impact certain energy sources (i.e. fracking, biofuels), terrorism (cyberterror which may create a whole new investing sector in the very near future).

What can governments and utilities do? It could be good to focus on disaster recovery efforts, crisis management, legislation, planning and strategy AHEAD of next major storm or terrorist threats that could rattle global financial marketplaces. New legislation could lead to new asset allocation by investors, technology companies, utilities and private equity. Legislation (i.e. endorsing modern nuclear power, offshore wind, etc.) may also cause new alliances, joint ventures as a result.

Could Frankenstorm be used a global blueprint for energy innovation? Here focus on efforts seen in New York and New Jersey emerging from the darkness and ruin left by Superstorm Sandy through the real next generation energy technologies and themes that

investors may want to focus on for the next decade (i.e. thorium nuclear reactors which China just announced they are moving toward—should the U.S. follow?).

Complacency is not the answer. Doing nothing and simply waiting for another major power outage that not only challenges our credibility as a superpower in a new world economy but could also cripple global market centers (maybe look at how slow Japan has reacted to Fukushima while Germany moved way too fast in my view to move away from nuclear power—something that has caused surging electricity prices).

ABOUT THE AUTHOR

John Licata is the Founder and Chief Energy Strategist of Blue Phoenix, an independent research & consulting company with a deep focus on public policy and emerging energy trends. His research challenges the status quo to rethink our collective beliefs about the environment and energy while kicking down some doors to find next generation solutions. John's forward thinking and unique insights into the future of global energy have made him a highly sought out industry veteran by media outlets such as CNBC, Bloomberg and BNN.

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