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Critical Literature Review
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How have Antarctic explorers from the heroic age shaped our understanding of leadership, and what links can be drawn between the historical accounts relating to Robert Falcon Scott, Ernest Shackleton and Roald Amundsen and more recent Antarctic exploration, and the literature focused on strategies to develop our leaders today?

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Abstract

In his 1977 critique of the heroic role of Scott in the British consciousness and character, David Thomson highlighted how late Edwardian values and education were a poor preparation for Antarctic adventure. In comparison Roald Amundsen, a Norwegian who virtually grew up on skis, trained for the mission in conditions similar to the Antarctic environment, and employed an unsentimental approach to using dog teams to reach the pole (Thompson, 2002). Accounts of Ernest Shackleton's unsuccessful attempt to cross the continent also provided fascinating insights into the values and approach to leadership in the Antarctic at the time (Alexander, 1998). The highly practical and scientific approach to preparing and leading groups used by Amundsen and Shackleton are still relevant today (Perkins, Holtman & Murphy, 2012).

Introduction

“Scott for scientific method, Amundsen for speed and efficiency, but when disaster strikes and all hope is gone, get down on your knees and pray for Shackleton.” (Raymond Priestly, civilian geologist and meteorologist, *Nimrod* and *Terra Nova* expeditions, as cited in Friedman, 2000, p.1).

The wealth of information and accounts on the early Antarctic explorers is presented in a variety of forms – with more than forty biographies of Scott alone, numerous accounts based on diaries and memoirs, and historical accounts with a particular scientific or personal focus. This review will discuss some of the more famous accounts in the literature and link these accounts to relevant themes in modern exploration, and what we can learn for developing leaders today.

Leadership in the historic age

“Adventure is just bad planning.” (Roald Amundsen as cited in Raeside, 2009, p.191).

The Commander must be a *naval officer*... and he must be *young*. These are essentials. Such a commander should be a good *sailor* with some experience of ships under sail, a *navigator* with a knowledge of *surveying*, and he should be of a *scientific turn of mind*. He must have *imagination* and be capable of *enthusiasm*. His temperament must be *cool* he must be *calm, yet quick and decisive* in action, *a man of resource, tactful and sympathetic*. (Sir Clement Markham as cited in Van der Merwe 2000, p.21).

The polar quest was not just exploration in the pursuit of science and discovery, it was also a race to the pole. In a letter to Sir Arthur Moore on 21 September 2009, Robert Falcon Scott wrote “I don’t hold that anyone but an Englishman should get to the South Pole.” (Van der Merwe, 2000, p.61). One of the most famous explorers of all time, Scott, who reached the Pole just over a month after Norwegian Roald Amundsen, died with three companions on the return journey (Murray, 1946). In his Message to the Public, discovered with letters and his diary in the tent where he died, he wrote: “I do not regret this journey, which has shown that Englishmen can endure hardships, help one another and meet death with as great a fortitude as ever in the past.” (Scott as cited in Murray, 1946, p.477).

Stories from individual men on Scott’s journey to the Pole on the 1910-1913 expedition resonated in the British consciousness and today provide insight into the mores of the era. Oates’ story, as told by Limb & Cordingley (1982) and his last words before leaving Scott’s tent to die; “I am just going outside and I may be some time,” (p.170) epitomised values important to the British at the time – those of sheer grit, a

sporting approach to personal risk and grace in the face of defeat. For a nation on the brink of world war, heroes who “died well” were venerated as a generation of young men perished in Europe. It was in this context that Scott’s Terra Nova expedition sailed south.

In his book Captain Scott Ranulph Fiennes (2004) presented a unique perspective as a seasoned explorer whose own experiences appeared to give him the ability to empathise with the hell Scott and his men went through. Commenting on the seven years it took him and his wife to organise an expedition to the Poles, with all the advantages that modern technology provides, Fiennes (2004) complimented Scott on his efforts to prepare for the 1901 *Discovery* expedition and subsequent expeditions, given the tools and information available, in months rather than years.

Fiennes (2004) commented that while Scott had a British Navy expedition model to follow, there was no established formula for Amundsen’s Norwegian expedition. This led to a much more flexible form of planning and delivery, exploited by Amundsen in learning from experiences in the north polar environment and also taking advantages of opportunities.

The severe British class system and naval discipline contrasted with Norse equality, or as described by Huntford (2009) Norway is a “little republic of explorers.” Amundsen and Scott had different philosophies of travel and discovery; skis vs man hauling, dogs vs ponies, canvas and rubberised cloth vs fur anoraks and Eskimo boots and most importantly; two different sorts of leadership and two particularly distinct personalities (Huntford, 2009).

When Ronald Huntford first published Scott and Amundsen in 1979 challenging the historical record and popular view of Scott it caused uproar. The revised and updated volume is still an entertaining, if not always accurate, read. Huntford’s (1979) careful analysis of Amundsen’s expedition, the contribution of Fridjof Nansen in providing advice and Amundsen’s years of experience training in a polar environment with dog teams provide insights into his expedition planning. Amundsen was originally motivated to be first to the North Pole – however as that objective was reached by another party, he trained instead for an expedition to be first to the South Pole. Amundsen’s party had simpler, more practical equipment, a clear strategy for provisioning the trip which involved killing dogs en route, and a small group of men with similar skills and fitness (Perkins et al 2012). Arriving back at Framheim ten days earlier than expected with provisions to spare, Amundsen commented the whole trip “went like a dream” (Huntford 2009).

Illustrating the practical nature of expedition planning and leadership, Feeney (2000) provided a tabular breakdown of sledging rations (per day) between Amundsen, Scott’s *Discovery* expedition, Scott’s Terra Nova expedition and a Polar team in 2000.

While calorific information is not available for Amundsen's team, they were dog driving rather than man hauling sleds, and provision of fresh seal and dog meat prevented dietary deficiencies. While Scott had considerably larger rations in his 1910-13 expedition compared to 1901-04 expedition, his rations were two thirds of calorific value of the meals for Team Polar 2000 (Feeney, 2000).

In a more recent attempt to examine the historic record and challenge established facts reported by a number of sources, including Fiennes (2004) and Huntford (2009), May (2006) posed the question of whether Scott's party could have been saved. Criticised for indecisiveness and sentimentality in various accounts, Scott did leave clear written instructions for relief support to be sent to the aid of the Polar party. Given the circumstances at Cape Evans and the decisions of the men there led to the relief party being sent too late and under strength, while Scott and his companions needed help relatively close by (May 2006). This more recent review suggests that the provisioning and other planning by Scott was adequate for the expedition, and it was disregard for his instructions which led or at least contributed to the death of Scott and three of his men.

In 1914 Ernst Shackleton travelled south for the third time with his men in the ship the Endurance with an ambitious plan to cross the Antarctic continent (Alexander, 1998). In what would become another example of British enthusiasm for venerating heroic adventurers which within a particular frame of reference could be termed as failure, the Endurance was trapped in the pack ice before reaching land and expedition members battled to survive until rescue in 1917. While it is beyond the scope of this essay to closely examine this expedition, the achievement of bringing home all his men alive was considerable, and the story of Shackleton's leadership and the loyalty of his men is one of the greatest epics in the history of exploration (Alexander, 1998).

In his engaging account of Shackleton's expedition, Commander Frank Worsley, the talented New Zealand born skipper frankly and warmly describes Shackleton's care for his men and his courage in doing his best to ensure their safety. When stranded on Elephant Island, Worsley (1940, p. 65-66) writes of the choice to take a boat to the nearest inhabited point:

"It was certain that a man of such heroic mind and self-sacrificing nature as Shackleton would undertake the most dangerous and difficult task himself. He was, in fact, unable by nature to do otherwise. Being a born leader, he had to lead in the position of most danger, difficulty and responsibility. I have seen him turn pale, yet force himself into the post of greatest peril. That was his type of courage; he would do the job that he was most afraid of."

A key difference between Shackleton's and Scott's style of leadership, mentioned in various sources and clearly summarised in Perkins et al (2012) was that Shackleton, instead of relying on the caste-based leadership system of the British Navy, where leaders came from a particular class, had special privileges and often observed the work being done, instead embraced an egalitarian approach where work, rations and privileges were equally shared by all in the party (Perkins et al 2012). Another contrast is that Amundsen and Shackleton both made a point of soliciting the ideas of their team members, and their decision making process was more transparent, giving expeditions members a greater sense of ownership and commitment (Perkins et al 2012).

Modern exploration

In Shackleton's Dream Haddelsey (2012) provided a comprehensive account of the British Commonwealth Trans-Antarctic Expedition, where Vivian Fuchs and Sir Edmund Hillary set out to succeed where Shackleton had failed. The expedition developed into another controversial "race to the Pole" reflecting differences in leadership style, approach, and ambition. Hillary established Scott Base in the Ross Dependency in 1956, and eventually abandoned some of his expedition scientific objectives and pushed his modified Fergusson tractors for his own unsanctioned Pole dash (Haddelsey, 2012).

The successful conclusion to the crossing of Antarctica was conducted in the media spotlight – unlike Shackleton who took care to guard his story until he could wire it to the Daily Mail, the story of Fuch's triumph had circled the world before he finally stepped out of his snowcat. Following this success, Haddelsey (2012) describes how Hillary was quietly dropped from New Zealand's Antarctic programme and plans in the Ross Sea Dependency, given his single-minded determination, his impatience of authority and his willingness to allow substantial autonomy to some of the scientific members of his party. Reviewing diary entries from various members of the expedition, it is easy to make comparisons between Hillary's leadership and the ruthless efficiency displayed by Amundsen (Haddelsey, 2012).

In the account of the first women to cross the Antarctic, and also the longest Antarctic crossing, Arnesen, Bancroft & Dahle (2003) illustrated some of the similarities and differences between modern Antarctic exploration and those of the historic age. Using modern training and nutrition, the two women crossed Antarctica on foot for the first time, while 3 million children in 65 countries followed their journey through updates, photos and video posted online via a satellite phone. Using diaries in a similar way to explorers over the last hundred years, Arnesen et al. (2003) noted the extremes in their emotional states in the entries. From the very early explorers to the modern day, diaries and logbooks are recorded with an eye to publication, and in a more recent feat, the first woman to cross Antarctica solo,

Felicity Aston also commented on her emotional isolation and intensity in December 2011 “I realized I would go a whole day and really not think about anything at all. My head was completely empty.” (Kottasova 2012).

Fiennes (2004) provided an interesting commentary on the use of diaries in forming the historical record on the heroic age explorers. Fiennes (2004) commented that he had personally written bitter and wholly uncharacteristic and sometimes inaccurate notes in his personal diaries in the midst of expeditions, reflecting personality clashes and other dramas of the moment, which were often exacerbated by conflict relating to decision making, and nutrition. These concerns do raise questions about the accuracy of a number of accounts, particularly those written based on diaries of the men by family members. Raeside’s account of Sir Charles Wright in 2009, Limb & Cordingley’s (1982) emotional story of Captain Oates and Cherry-Garrard’s (2001) first hand account of the journey are examples.

Leadership today

The study of leadership has expanded relatively recently; in her 1984 text Barbara Kellerman comments that the study of leadership tended to be prescriptive rather than descriptive, and sat outside the academic mainstream. Leadership research is now a fertile field, and establishment of new journals (such as *Leadership* and *Journal of Leadership Studies*) demonstrates its relevance to interdisciplinary contemporary scholarship (Bryman, Collinson, Grint, Jackson & Uhl-Bien, 2011).

Leader development is focused on developing individual capabilities and has been defined as “the expansion of a person’s capacity to be effective in leadership roles and processes.” (Van Velsor & McCauley, 2004, p.2). Leadership development, often used as a synonymous term, actually reflects team building and developing organisational performance (Van Velsor & McCauley, 2004).

What is thought to develop in leadership development includes individual self management capabilities (e.g. self awareness, balancing conflicting demands), social capabilities (e.g. ability to build and maintain relationships, communication skills and developing others) and work facilitation capabilities (e.g. management skills, ability to think/act strategically and ability to initiate and manage change) (Day, 2011).

Perkins et al. (2012) proposed a model of leadership based on the leadership characteristics and style of Antarctic explorers of the historic age. The highly practical and scientific approach to preparing and leading groups used by Amundsen and Shackleton are still relevant today (Perkins, et al. 2012). With a similar Navy background to Scott and Shackleton, Perkins, et al. (2012) demonstrates the power of strong leadership in times of adversity and uncertainty and describes leadership lessons from the race to the South Pole. These four factors closely reflect research

described by Van Velsor & McCauley (2004) and Day (2011), and also link to other literature examining leadership in an exploration context (Orams, 2009) and are described below:

1. *Effective leadership requires a clear strategic focus.* Amundsen's original ambition was to be first to the North Pole, and when that prize had been claimed, Amundsen shifted his focus South. The clarity of having one objective contributed to his success in reaching the Pole and his ability to bring his men safely home. The twin aims of Scott's expedition of scientific discovery and attainment of the South Pole for the British Empire meant that Scott, striving to meet both goals failed in his achievement. Hilary credited his success for his unsanctioned Pole dash in 1956 to the strength of his vision that it was possible to drive a Massey Ferguson tractor to the Pole (Haddelsey, 2012).
2. *Successful leaders are open to new ideas.* Amundsen owed much of his success to the use of superior technology for polar travel – skis, dogs, clothing and diet. Amundsen refined his existing skills on skis by using ideas from the Inuit. Scott and Shackleton in contrast were surprisingly resistant to the use of these proven methods, and given their first journey to the Pole in 1902, failed to recognise and remedy planning and provisioning errors made in early expeditions. More modern expeditions have tried and tested a range of new technologies flexibility and openness to new ideas is crucial to the success of an expedition (Fiennes, 2004).
3. *Leaders need to draw on the collective wisdom of the team.* As a leader, Scott believed it was his unique responsibility to analyse situations and draw conclusions, and his decisions were closely held and sometimes communicated just before execution. Amundsen and Shackleton both made a point of soliciting the ideas of their team members, with the result their actions were better informed and their men took greater ownership in decisions made. Arnesen et al. (2003) commented that given the extreme conditions that they faced in the Antarctic, the need to involve partners and funders in decisions was crucial to the success of their expedition.
4. *The best leaders forge strong team bonds.* Scott did inspire loyalty from key expedition members, and his polar party stayed together until the very end. However, Shackleton and Amundsen were more able to form cohesive bonds within their teams which better enabled everyone to work together in the face of daunting adversity. Neither Shackleton or Amundsen led perfectly harmonious expeditions, but both leaders demonstrated the critical skills needed to maintain a unified team.

Middleton (2007) looked more closely at the personal changes a leader needs to make in order to succeed in a world where leaders need to influence partners and professionals over whom they have no authority. The traditional tools to develop leaders where there is a direct reporting relationship do work – however leaders today need to be able to make changes across functions they do not control – e.g. chief executives need to produce change within their organisations but across functions they don't control, and police officers have to work alongside health and housing professionals (Middleton, 2007).

Antarctic exploration today can be more complex than raising capital and a team to go and be “first” to a particular objective. With ever more sophisticated scientific objectives relating to the possible future of the planet, with social media and the always-difficult quest for funding, leaders of Antarctic expeditions must work across the traditional structures to achieve successful outcomes. While, as Middleton (2007) comments, leader development factors such as those described by Perkins et al. (2012) are effective, these tools may not take us far enough. Leaders in Antarctica in the future will need to lead beyond authority and use non-traditional techniques to influence others and achieve their objectives.

Conclusion

Antarctic explorers of the heroic age are some of our most famous historic figures and their feats have shaped our understanding of what it means to lead and also to succeed (Perkins et al., 2012). These stories still resonate and the themes of decision making and planning needed to survive continue to be relevant today (Huntford, 2009). The highly practical and scientific approach to preparing and leading groups used by Amundsen and Shackleton provide a fascinating study and pointers to those wishing to consider their own development as leaders. Accounts of more recent Antarctic exploration echoes the themes of early explorers and also hint at the future direction for developing leaders – to develop skills as described by Middleton (2007) to lead beyond their direct authority to achieve their objectives.

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