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***LOOKING BACK
AT
LEADERSHIP IN THE HEROIC AGE***

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ABSTRACT

This paper looks at leadership characteristics of the Heroic Age explorers Gerlache, Drygalski, Nordenskjöld, Charcot, Filchner, Mawson and the better known Scott, Shackleton and Amundsen. The creation of heroic images and how these change over time is explored and the way different cultural and political contexts impacted on the leadership styles of these men. A description of the Antarctic environment at the time, and the resources available to endure its hardships, shows the limits to which expedition leaders were tested. Whether successful expeditions were due to special leadership characteristics, or other qualities such as scientific knowledge and interest, is explored through the backgrounds and styles of the nine leaders. Finally, making comparisons between these leaders across time and cultural and historic contexts is challenged. This is a feature of contemporary management literature, and their interpretation of the leadership characteristics and use of examples of Heroic Age leaders is critiqued.

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1. INTRODUCTION

The opening up of Antarctica for science and exploration followed the Sixth International Geographical Congress in London in 1895. This passed a unanimous resolution that the signatory countries (including the major powers in Europe) “should do their utmost to conduct scientific exploration of the unknown region of Antarctica” (Fiennes 2004: 8). Britain was the leading imperial power at the time and persuaded many countries that Antarctica should be a priority for new exploration.

There was a “subsequent rash” of national scientific expeditions between 1895 and 1917. These featured Borchgrevink, Scott and Shackleton (Britain), Gerlache (Belgium), Nordenskjöld (Sweden), Charcot (France), Amundsen (Norway), Drygalski and Filchner (Germany), Bruce (Scotland), Mawson (Australia) and Shirase (Japan) (Headland 2009). These leaders’ expeditions formed the “Heroic Age” of Antarctic exploration: a term coined by the British explorer Duncan Carse in 1956. Writing in *The Times* he described Shackleton’s 1916 crossing of South Georgia as “three men from the heroic age of Antarctic exploration, with 50 feet of rope between them, and a carpenter’s adze” (Wikipedia.org 2012).

Exploring the unique and extreme Antarctic environment was very challenging in the early 1900s and expedition leaders were a mixed lot, with different cultural backgrounds, motivations and ambitions. Whether there were special characteristics of leadership on which successful expeditions depended, or was success due to other qualities such as scientific background and interest, are relevant questions, given the way leadership examples from the Heroic Age are being used in today’s management literature. The changing images of Heroic Age leaders over the past century raises other questions, beyond the scope of this paper but being increasingly addressed in the literature (notably Riffenburgh 1993; Jones 2003, 2011; Barczewski 2007; Larson 2011; also the contribution by Solomon, 2001). This is relevant because the cultural context in which we view leadership today necessarily influences the way we interpret any lessons from the heroic age.

Scott, Shackleton and Amundsen have received the lion’s share of attention in literature, film and parlance over the last century. A much wider range of lesser known expeditions were successful in their Antarctic quest. These were led by men who undertook comparable feats of courage and leadership, but did not achieve public acclaim as their objectives did not include the South Pole (Bickel 1977: 13). Each expedition leader had to manage within the specific paradigm of his cultural context and they led in very different styles and ways. These contexts would have influenced and even determined particular leadership attributes.

The paper begins with biographical outlines drawing on leadership styles and traits of the lesser known leaders Gerlache, Drygalski, Nordenskjöld, Charcot, Filchner and Mawson, followed by a section on Scott, Shackleton and Amundsen. Commentary follows on the privations these expeditions endured and the risks they faced, as context for understanding their leadership qualities. The place of science at the time is outlined, because this was also the “Heroic Age of Antarctic

science” (Larson 2011). Science was central to the British efforts and the international co-operation prevailing in the early Heroic Age expeditions. Other motives and perspectives, political and personal, are explored through the biographies.

The discussion begins with the way images of heroes are created, which inevitably change over time, and the problem this poses for a proper understanding of Heroic Age leaders. The management literature draws on features of leaders in the Antarctic environment and the way these are applied is explored. The problems in making comparisons across different cultural contexts and expectations, across time and varying retrospective interpretations, are discussed. In drawing these themes to a conclusion the qualities of Heroic Age leaders are looked at through the lens of the management literature, to test whether there are indeed any “lessons”, or even general characteristics of successful leaders in the heroic age of exploration.

2. BIOGRAPHICAL OUTLINES

2.1 Adrien de Gerlache (1866-1934)

Belgian Antarctic Expedition 1897-99 (*Belgica*)

Even before the Sixth International Geographical Congress in London in 1895, Gerlache was organising his own expedition to explore the south. Impetus for the Heroic Age of Antarctic exploration came from a lecture given to the Royal Geographical Society in London in 1893, by Professor John Murray. He proposed that a new Antarctic expedition should be organised to "resolve the outstanding geographical questions still posed in the south"(Crane 2005: 75). Gerlache's preparations were already underway.

There was an uneasy relationship between the Royal Geographical Society and the private and commercial expeditions such as that of Gerlache. Contributing to this was the fact that British geographical authorities had come to consider polar exploration their exclusive province and national pride was dented when explorers from other nations delivered results. The eccentric Anglo-Norwegian explorer, Carsten Borchgrevink, was snubbed by the British establishment as an “arrogant upstart” (Baughman 19); said to be the first to set foot on the Antarctic continent itself in 1895 he was certainly the first to overwinter there in 1899. The scarcity of funds and their diversion by expeditions such as those of Borchgrevink, Gerlache and later, William Bruce (Scotland), were also a concern to the Society. (Royal Geographical Society 1995: 344).

Gerlache was a 29 year old naval lieutenant and his main object for the expedition was scientific research. Many facets were studied including ice drift and collections of geological and zoological specimens. The first annual cycle of Antarctic observations were collected and meteorological observations made every hour (Hoyer 2000: 77). Large collections of geological and natural history

were taken (M 1934: 961) and as part of his exploration of the Peninsula the expedition is noted for the discovery and mapping of the Gerlache Strait (Headland 2009: 229).

Gaining financial support was a challenge as Belgium's eyes were on the Congo, not the Antarctic, but the Brussels Geographical Society were interested and Gerlache managed to raise sufficient funds to embark on the journey through public subscription. The men that Gerlache recruited were the most international crew of all the Heroic Age expeditions. They included young scientists from Rumania , Poland, Belgium, Norway, Russia, and America. The last was the doctor Frederick Cook who proved invaluable, as did the young Norwegian who joined, Roald Amundsen.

Reaching Antarctic waters late in January 1898, too late in the season, they continued charting until March. Gerlache was at cross-purposes with his scientists who wanted to remain and investigate the Peninsula region but he pressed on to a higher latitude, reaching 71°30'S. The ship *Belgica* became frozen in the pack ice where it drifted in the floe for a year.

They were forced to overwinter, the first to do so within the Antarctic Circle, in the Bellingshausen Sea. Preparations for the expedition had not always been transparent. The ship was certainly ill-prepared, the provisions unsuited, including clothing, lanterns and stoves. Critics have asked if Gerlache intended to spend winter below the Antarctic Circle (Reader's Digest 1985: 131), if so there are questions about how well planned it was. Communication with the different languages became a problem as the men endured the long night: perpetual cold, crowding, illness, despondency and an inadequate diet. This last led to scurvy. Gerlache refused to eat fresh seal and penguin meat, even stopping his crew doing so, until the doctor Cook induced him to consume it for "medicinal purposes" as an example to others (Reader's Digest 1985: 132). Cook effectively assumed command of the *Belgica* when Gerlache became sick, assisted by Amundsen who provided an experienced link between the officers and crew. Gerlache strove to ensure the ship was ready to break free from the ice if and when the opportunity came, which it did a year after being beset.

There were problems with the expedition even before it reached Antarctic waters, some of which reflected the different status between the officers and the crew. Such treatment was not unusual then and accounts of these issues at the time were more subtle than the pronounced commentary they receive today (Hoyer 2000: 77). However, Gerlache may not have taken sufficient care in selecting the members of the expedition, and seemed to pay little heed once they were recruited. Two of the original crew abandoned the expedition as early as a port in Belgium, others in Punta Arenas, which reduced their number to nineteen (Reader's Digest 1985: 131). Some seemed to have little basic seamanship. Gerlache's own account in *The Voyage of the Belgica: Fifteen Months in the Antarctic* (1998) refers to fighting, drunkenness, insubordination and further disciplinary problems with men refusing to work when required.

Gerlache was a complex character and not a great planner nor a leader, yet he was certainly visionary, driven to achieve his own goals, at times perhaps at the expense of communicating with his followers. Nevertheless, he achieved his aim: his voyage was feted on his return to Europe and considered remarkable. Results were what counted and tales of survival against extreme odds. Prior to his expedition nothing was known of winter conditions in the Antarctic. This meant their meteorological observations were pioneering and important. They had made kayaks for local journeys and were the first to use sledges in Antarctica (Headland 2009: 229). Gerlache was tenacious in ensuring the collections and data were in good condition, and generous in allowing the scientists the credit for their work (H.R.M. 1934: 961).

He was married twice, in 1904 and 1919, and had children to both wives. The second was a Swedish woman and their son Gaston followed in his father's footsteps: in the 1950s he participated in a Belgian research station in Antarctica.

2.2 Erich von Drygalski (1865-1949)

German South Polar Expedition 1901–03 (*Gauss*)

The first German expedition was fully funded by the government, including the building of a new ship for the purpose, the *Gauss*. This was in response to other countries' polar expeditions; Drygalski's 1899 proposals for the expedition prompted this comment from Prince von Arenberg:

“the German Reich, with its enormous merchant fleet, and its vast trade network which is expanding every day, cannot be shamed into doing nothing” (Drygalski 1989: iii).

Nationalistic remarks with respect to Antarctic exploration were not confined to Germany, and in fact the purposes of the German Expedition were subject to two opposing forces. Drygalski's own were couched essentially in scientific terms, covering a wide range of interests; then there was the political dimension, which had been important in bringing the expedition to fruition (Drygalski 1989: vii).

Given his capabilities Drygalski was chosen to lead the expedition. What had been recognised was

“the paucity of candidates in Germany suitable for the task of leading an expedition, willing to risk everything, absolutely determined, yet of solid scientific worth.... He had to prove in addition that he could grasp the scientific problems presented by the world of ice, examine them, and show that he could then draw conclusions of general validity” (Drygalski 1989: vi).

Drygalski was then 36 years old and a Professor of geography and geophysics at the University of Berlin. He had previous polar experience on an expedition to Greenland and a good track record of being able to carry out serious scientific studies. Previously an assistant at the Geodetic Institute and the Central Office of International Geodetics in Berlin, Drygalski had then led two expeditions between 1891 and 1893. One of these expeditions overwintered in Western

Greenland in 1892-93.

After exploring the region south of Kerguelen Island and visiting Heard Island the expedition ship *Gauss* was trapped in pack ice about 80 kilometres from shore in February 1902 and remained there for over a year. Drygalski and his men were to encounter many of the hardships of the Antarctic winter, just as the crew of the *Belgica* before them, however, his ship was adequately supplied and very comfortable. By sledge they made the geographical discoveries of Wilhelm II Land and Gaussberg. Three ascents by hydrogen balloon were made and observations relayed to the ship by telephone; these were also used to indicate the most promising route out of the ice that beset the ship. Significant new material was brought back from their comprehensive scientific programme and Drygalski's life was dedicated to painstaking preparation of the scientific results of his expedition (Drygalski 1989: vi; Ayres 1999: 37; Headland 2009: 233).

Expectations of Drygalski were high as the British Discovery Expedition had left only five days before his ship *Gauss*. Drygalski's plan was to have pushed for both the geographic and magnetic south poles the following spring; he subsequently argued it would have little scientific value, its worth being "purely as a spectacular exploit" (Drygalski 1989: vii). The government terminated the expedition on its return voyage. Financial support was exhausted and there had been little inclination to sink private capital in to the venture. The Kaiser was disappointed: politically the expedition was seen as a failure against the expectation set for the latitude it might reach (which was 66°40'S, as against Scott's limit of 82°16'S in 1902). It was accepted that

"in the case of polar expeditions [the public] tends to ask first and foremost what latitude was reached" (Drygalski 1989: vii).

At the time, German experience of polar seas was small, and Drygalski was the first to investigate the unknown region of eastern Antarctica. A civilian, at times seen as a father figure, even officers came to him with their problems. He had a feeling for people; while he needed to work within the naval discipline, he had all the crew involved in scientific work (not just the scientists) and so the interaction among all men worked better. He ensured that all enjoyed good food and that there was sufficient for all (Rack 2013). Some were to enlist on the second German South Polar Expedition of 1911-12 in the *Deutschland* under Wilhelm Filchner.

However, there was disagreement about the way responsibilities were divided between Drygalski and the Captain of the *Gauss*. When Drygalski concluded a second winter in the ice was impracticable, "[t]his disquiet expressed itself eventually in what were effectively charges of cowardice and a failure of nerve" (Drygalski 1989: iv). Cautious and safety conscious, the first winter on the *Gauss* was adequately provisioned and comfortable. In ordering the return home, Drygalski wrote

"It was a most difficult decision, certainly the most difficult one I had to make, but it was necessary. There was no safe place to spend the winter here ..."
(Reader's Digest: 143).

Overall the expedition was considered well-organised and well-equipped (Turney 2012: 181). Yet while no expedition was without its mishaps, there seemed to be a series of them. There was some profiteering from sale of furs and birds from the expedition when they reached South America, which led to accusations of unscientific behavior. Drygalski dismissed this as “essentially trivial” (Drygalski 1989: 328) even though it reflected poorly on other scientists in the expedition. However, there were also ingenious solutions to practical problems: using a penguin to run a line from stern to stern of the ship underwater; and using dark material and waste to melt the sea ice and assist in freeing the ship (Drygalski 1989: x).

Drygalski remarked “there was no high drama, no disasters, no wild successes” (Drygalski 1989: xi). Nevertheless, in terms of the expedition being considered a failure by some, a reading of his accounts show “in terms of courage, endurance, ingenuity and determination as well as in its scientific aspects, that it was not” (Drygalski 1989: xi).

Drygalski was known as a dedicated scientist and excellent teacher. Prodigious in his research and publications, there is scant reference to a private sphere in the literature. In later life Drygalski was a member of many academies, honorary member of numerous geographical societies, and recipient of their medals. In 1944 the Munich Geographical Society, which he had headed for twenty-nine years, established the Erich von Drygalski Medal in his honor.

2.3 Otto Nordenskjöld (1869-1928)

Swedish South Polar Expedition 1901-03 (*Antarctic*)

Nordenskjöld, a professor of Geology, led the non-government Swedish expedition of 1901-03. Unlike Scott's and Drygalski's expeditions that were government funded, Nordenskjöld's expedition was entirely dependent on private contributions. While it earned lasting fame at home, its huge cost left him greatly in debt. He was the first to explore the territories East of Graham Land in West Antarctica, doing significant mapping of the Peninsula.

The expedition ship *Antarctic* was placed under the command of Carl Larsen, an experienced Antarctic explorer. The expedition members were marooned in three separate parties on different parts of the Peninsula after the sinking of their ship *Antarctic* in the Weddell Sea. The men at Snow Hill Island, Paulet Island and Hope bay all suffered danger and hardship throughout a long winter. They managed to reunite through a remarkable story of courage and luck, and were later rescued by the Argentinian naval vessel *Uruguay*.

A geologist with wider scientific interests, Nordenskjöld had significant experience leading geological expeditions to Tierra del Fuego and the Yukon between 1895 and 1898. His polar expedition included seven carefully selected scientists, each with specific responsibilities and they produced scientific results “arguably the most important from the Antarctic from that date [1903]” (Reader's Digest 1985: 306). Their subsequent output and publications in five

languages ensured world-wide relevance of their discoveries and conclusions. These provided taxonomies, classifications of ice, glaciers, shorelines, rocks, marine life and so on (Elzinga 2006: 149; Cioccale and Rabassa 2006: 122). All this was achieved despite losing all their notes and early specimens when the ship *Antarctic* sank. They struggled for 14 days to reach Paulet Island, 40 kilometres away over shifting sea ice and across open water in a whale boat.

As a Christian Nordenskjöld's belief in ecumenical co-operation extended to science (Elzinga 2006: 143). His decision to share information about his observations and specimens with Argentinian institutions (Cioccale and Rabassa 2006: 125) illustrates his international rather than nationalist focus. A young Argentinian Navy Officer joined the expedition crew in Buenos Aires in return for food, fuel and help from the Argentinian government (Coolantarctica 2001). A further example of Nordenskjöld's openness and commitment to international co-operation was his successful lobbying for a joint Swedish-British expedition prior to the First World War. However, by 1919 this had fallen victim to the war years and abandoned (Elzinga 2006: 155).

Nordenskjöld rejected the nationalist and imperial rivalry associated with the race to the pole, instead "cherishing internationalism and science above national prestige and geographic exploits" (Elzinga 2006: 151). He saw "mere exploration and the planting of national flags" as a ridiculous venture (Elzinga 2006: 144); to him, even geographic discovery was narrow and limited compared with scientific research. Given that Shackleton had been close enough on the plateau (180 km) to know what the South pole would look like, Nordenskjöld's priorities were such that

"he found it strange that, when only the aspect of "*the record*" remained at the south pole, then suddenly there was a rush from different quarters to reach the mathematical [we might say "imaginary"] polar point" (Elzinga 2006: 150).

Science was the important thing to Nordenskjöld, and he conducted a comprehensive scientific programme which included work in the Falklands, South Georgia and Tierra del Fuego. He believed in a science that was international and would benefit all mankind regardless of class or nation, and in his support of internationalism in polar science he was ahead of his time. He tried to promote better organisation and co-ordination of polar research through the International Polar Commission in 1905 (Elzinga 2006: 154), however, this had ceased to function by around 1916. It was not until 1959 that science was to be institutionalised as an international regime, under the Antarctic Treaty.

Nordenskjöld's focus on science was unencumbered by nationalist interests, unlike other expedition leaders of the heroic age. The Swedish government at the time did not have ambitions to claim title to Antarctic territory and appeared to have no legal analysis of the right to title to territory there (Elzinga et al 2004: 314-7). The performance of scientific activities would not play a role as a basis of the right to participate in the political management of Antarctica until the 1959 Antarctic Treaty (Elzinga et al 2004: 308). Swedish political interest in Antarctica did not develop until the 1970s (Elzinga et al 2004: 320).

Their ship *Antarctic* was placed under the command of Carl Larsen, an experienced Antarctic explorer, who proved a strong leader of the ship-wrecked party on Paulet Island. Nordenskjöld's leadership of the expedition received criticism from the scientists on the expedition for its poor planning and improvisation in research techniques: a more reserved critic said "things could have been better" (Elzinga et al 2004: 111). Social relations during the second winter were more tense than the first. His failing appeared to be an aversion to conflict and not talking about difficulties or resolving them; not the qualities of able leadership. Reserved, uncommunicative, even timid were used to describe him; understandably, he felt himself to be a lonely figure, aware of his lack of success in spite of his preparations and sacrifices (Elzinga et al 2004: 112).

Despite this, Nordenskjöld was concerned for the safety of his men, and made balanced judgements: "he wanted to go further but time was short so the ship retraced her course" (Reader's Digest 1985: 152). Many sledging trips were made for scientific purpose, with one covering 611 kilometres in 33 days, the men returning exhausted. Nordenskjöld decided it was time to turn back when they met continued bad weather and bad luck (injury, loss of a tent and the dogs finding and eating all their pemmican).

Nordenskjöld came from a tradition of science and learning and a liberal culture of education. He was a complex person with vision, principles and personal values, which he acted out in his professional scientific work. His selection of men for the expedition was such that they not only succeeded in terms of subsequent scientific output, but also survived the duress of two Antarctic winters. He was not driven by self or national interests; his primary concern was for science (Nordenskjöld: 1905). On his return in 1905 he was appointed professor of geography and ethnography at the University of Gothenburg. He continued his exploration, to Greenland in 1909 and Chile and Peru in the early 1920s.

2.4 Jean-Baptiste Charcot (1867-1936)

French Antarctic Expedition 1903-05 (*Français*)

French Antarctic Expedition 1908-10 (*Pourquoi-Pas?*)

Son of a distinguished and brilliant doctor, Charcot had a good education, was well travelled and comfortable in society. He followed his father's expectations that he "obtain a noble and eminent position in life, to *excel in something*" (Oulie 1938: 15) and became a doctor. However, he felt he was in shadow of his father's reputation: "[a]s a doctor I should never be anything other than the son of the great Charcot" (Oulie 1938: 32). On inheriting his father's fortune he invested it in his expeditions, and went to sea.

He distinguished himself as a sailor, declaring he "liked foul weather as it gave him the chance to show what he was worth" (Oulie 1938: 37). Impelled to a wider destiny, he saw the absence of France among the great expeditions of Britain (Scott on the *Discovery*), Belgium (Gerlache on the *Belgica*), Germany

(Drygalski on the *Gauss*), Scotland (Bruce on the *Scotia*) and Sweden (Nordenskjöld on the *Antarctic*). His motivation was science rather than nationalistic pride. Of his ship the *Pourquoi-Pas?* he wrote:

“she is ready to take again her mark of interrogation into the region of the unknown and to face fatigues and dangers for the honour of French Science” (Charcot 1911: 308).

Charcot had met Nordenskjöld and shared his internationalist approach to scientific research (Oulie 1938: 66). He described the polar extreme as the great equalizer:

“Beyond the Polar Circle there are no Frenchmen, no Germans, no English, no Danes: there are only the people of the Pole, real men.” (Elzinga 2006: 153).

Charcot was thirty when he set off on his first Antarctic Expedition, and had been married some seven years, although unhappily, to the granddaughter of Victor Hugo. He was to remarry in 1907, his young wife Meg then accompanying him as far south as possible on the second expedition. This marriage was conditional on Meg not opposing his sea-going journeys; Charcot named Marguerite Bay after her (Oulie 1938: 104). He was to have three daughters.

Motivated by the desire to help in the search for Nordenskjöld’s *Antarctic*, in 1903 Charcot headed south for Antarctica on the *Français*. He built huts and overwintered at Booth Island on the Peninsula, charting much of the west side of the Peninsula while carrying out a scientific programme. His empathy and human understanding were illustrated by the personal space all on board the ship were given, and his ability to keep morale high through various activities. Charcot paid attention to food and his expeditions ate much better than others, in typical French style: it was not for them to eat hard-tack. While not French, the cook hired in Buenos Aires baked fresh bread every day and cakes and croissants on Sundays (Reader’s Digest 1985: 168). Special days were marked with parades and masquerades, plays were performed and birthdays celebrated (Charcot 1911: 158, 206). Charcot was aware that life goes on “at once busy and monotonous; and if the months pass quickly, the hours are long” (Charcot 1911: 209). Much scientific study and surveying was carried out during this first trip, in which despite the near shipwreck of the *Français*, there was no loss of life.

Returning to Antarctica in 1908 on the *Pourquoi-Pas?*, Charcot led another expedition. This also overwintered, undertook extensive work and surveyed two thousand more kilometres of coastline including new territory:

“There I should be able to continue the researches of the *Français* (themselves considered so valuable) in all branches of science, and to verify, complete and expand them.” (Charcot 1911: 4-5).

A contemplative man, with a horror of the superficiality of society, he nevertheless had a robust personality (Oulie 1938: 51). Refusing to use physical discipline on his crew, he instead appealed to their conscience and patriotism to “play the game” (Oulie 1938: 67). Animals were not to be killed unnecessarily (Oulie 1938: 74, 79), and responsibility for the lives in his care and the risks he asked them to face weighed on him:

“I had no means of foreseeing, however, what we might discover, and the unknown nature of my undertaking when I made a choice of this sector of the circle rendered the organization of the expedition all the more difficult, since it was necessary to be ready for any emergency and it was impossible, as in the case of an attack on familiar ground, to concentrate one’s preparations for a struggle against forces which could not be foreseen.” (Charcot 1911: 5).

At a time of doubting his own leadership ability on the voyage of the *Français*, Charcot frankly discussed this with the three most close to him. He also openly discussed the risks of their situation with the crew, allowing them to withdraw from their contracts should they wish (Oulie 1938: 64). His judgement of risk was demonstrated again at the end of the summer of 1908-09, when he decided to look for winter quarters:

“The situation is therefore most grave, and the moment is one of those when the responsibility of the head of an expedition is truly agonizing. If our expedition were merely one on adventure, aiming simply at beating the record or accomplishing a sporting feat, I would gladly take the risk” (Charcot 1911: 131).

Despite it being a blow to leave the region where he might have accomplished more interesting work, and make important sledging excursions, he again called his companions together and asked their advice before making this decision.

“with anguish of heart ... I made up my mind; but really I did not think I had the right to cause the Expedition to run such big risks any longer” (Charcot 1911: 131).

Such leadership traits earned Charcot loyalty and many of his crew and expedition party were to accompany him in later voyages.

Charcot’s work and character were lauded by his peers: Scott called him “the gentleman of the Pole” (Reader’s Digest 1985: 173), and Nordenskjöld was impressed by his well-planned expedition, presenting him with five Greenland huskies. He was awarded the Distinguished Service Cross for his courage in the British Royal Navy during the First World War. The Polar historian Edwin Balch said of Charcot:

“No-one has surpassed him and few have equalled him as a leader and as a scientific observer.” (Reader’s Digest 1985: 173).

Charcot’s aim of getting France to participate in collaborative international Polar research was more fully realised in the 1932-33 Polar Year, which he was actively involved in planning (Oulie 1938: 196-9). This second Polar Year promoted the collective effort on the part of every country interested in scientific endeavour, and the principle of planned, prompt and shared publication of results (La Cour and Stagg 1933). Like Nordenskjöld, he envisioned science on an international canvas, foreshadowing the Antarctic Treaty 50 years later.

2.5 Wilhelm Filchner (1877-1957)

German South Polar Expedition 1911-12 (*Deutschland*)

Filchner was well educated and grew up in Zürich with Liszt as a family friend (Reader's Digest 1985: 304). He joined the Prussian Military Academy as a youth and his first expedition was in Russia when he was 21 years old. Sponsored by the army, at 23 he did a solo journey on horseback through the Pamir Range of central Asia, perhaps a sign of his being a natural loner rather than a suitable leader.

He led the second German expedition which reached the head of the unknown Weddell Sea. However, it failed in its main purpose which was to cross from the Weddell to the Ross Sea. Despite this, discoveries were made including the Filchner-Ronne Ice Shelf and important oceanographic data collected from the outset, evidence of the circulation of the world's oceans.

Filchner was a 34 year old lieutenant in the Bavarian army when he led the expedition, but none of its members had true polar experience. He gained permission from the Kaiser to raise funds through a public lottery, but in the end suffered the shortage of funds common to Antarctic expeditions. Filchner had worked hard to develop research links and took advice on planning and equipment, testing men, equipment and ponies briefly in Spitsbergen (Turney 2012: 182). He received support from the Berlin Geographical Society whose committee took over aspects of the organisation of the expedition, which had some detrimental effects. They confused the line of command between Filchner and the Captain, Vahsel. He was known to be "trouble" and along with the difference in character between the two men, and Vahsel's advanced syphilis, this led to an atmosphere of tension and suspicion (Turney 2012: 185-196). So despite being well provisioned and with a sound ship *Deutschland*, the journey was plagued by difficulties of personality, sabotage, suicide, death, fighting and a proposed duel (Allen 2012: 1).

Under Maritime Law, The Captain of the *Deutschland* was in charge of the vessel and had control of the lives on board while at sea. Their first winter camp was erected on a controversial site, on an iceberg that quickly calved, requiring them to winter over in the ship, frozen in and drifting in the pack ice for nine months. Filchner had lost control of the leadership of the expedition. The crew split into two camps, those loyal to the Captain and those to Filchner. During a three week sledging trip the ship drifted 38 miles, challenging Filchner's party to get back. After the death of the Captain, there were disagreements about who would take command, fighting and men carrying loaded guns out of fear for their lives. At this ignominious end they "all agreed that the less noble aspects of the trip were best kept to themselves", but they remained preserved in diaries (Allen 2012: 3).

Having "had enough of 'Antarctic Doings'" Filchner never returned and spent his life exploring Central and East Asia (Reader's Digest 1985: 205).

2.6 Douglas Mawson (1882-1958)

Australasian Antarctic Expedition 1911-14 (*Aurora*)

Mawson had been a member of Shackleton's British Antarctic Expedition in 1907 (the Nimrod Expedition) and led the Australasian Antarctic Expedition (AAE) of 1911-14. This undertook extensive scientific programmes with shore parties overwintering and conducting sledge journeys. The expedition surveyed and mapped the coast and inland territories of Antarctica directly south of Australia. It is better known for the Far Eastern Sledging Journey and Mawson's epic story of survival after his two companions, Belgrave Ninnis and Xavier Mertz, died.

In 1908 he was in a party that ascended Mt Erebus and later that year set out on a sledging trip to the Magnetic South Pole. Questions were later raised about the accuracy of their measurements, and hence that achievement (Ayres 1999: 70). During that brutally challenging trip Mawson deposed the Professor (Edgeworth David) who was the leader, on account of his unfit state. In a tribute paid on their return to Australia, the Professor said

“Just as Shackleton was the general leader, so ... I say that Mawson was the real leader and was the soul of our expedition to the magnetic pole. We really have in him an Australian Nansen, of infinite resource, splendid physique, astonishing indifference to frost.” (Ayres 1999: 29).

By comparison with expeditions only ten years earlier, the AAE was well organized and was widely considered to be the most scientific in its planning, execution and ambitions (Hains 2002: 44). Mawson was not yet thirty years old. His growing knowledge and experience was evident; not only had he been to Antarctica with Shackleton, he spent time with other explorers in Europe. He had visited Scott and Edward Wilson, scientists associated with Drygalski's and Nordenskjöld's expeditions in Europe and elicited the help of Charcot and Gerlache (Ayres 1999: 31-42, McEwin 2008: 38).

Mawson remained uninfected by Pole fever, seeing “little of scientific value in a dash to the Pole” (Ayres 1999: 33), and had declined Scott's invitation to join his expedition. He spent 1910 and some of 1911 working to raise the necessary funds for his own, the AAE, in England, Europe and Australia, walking the long corridors of influence and money with a determination to win through all difficulties. For a man who was to later write in his diary that he was “[m]ost humanly lonely in London” (Ayres 1999: 66), this promotion of the expedition demonstrated leadership in overcoming obstacles. Fund-raising continued on his return where he “appealed to Australia's growing sense of nationhood: on Australia's doorstep was a vast new southern continent waiting to be discovered” (Turney 2012: 214).

Mawson's AAE ranked among the greatest contributions to science that the Royal Geographical Society in London had witnessed (Turney 2012: 255). In the context of the internationalism of science, “[i]t was the AAE that helped establish the form that Antarctic science would eventually take” (Riffenburgh 2010: 420). Of any expedition so far, Mawson had selected the largest number of scientists

(Turney 1912: 210). Mawson always put science first, and he embodied the scientific ideal of the expedition, describing his challenge as the leader in a private letter:

“The men were all young and without previous extended field experience and that meant the utmost drain on my abilities in order to secure the measure of results that accrued.” (Ayres 1999: 97).

While much had been learnt in the decade or so of polar travel in the region, they were still in unexplored territory and chose a very difficult location for their main winter quarters. This “windiest spot on earth” was swept by katabatic gales rushing down from the high plateau area (Ayres 1999: 63). Nevertheless, Mawson appreciated their situation, writing in his diary:

“Life opens up to one as it must to the savage. Inside the Hut it is 20th Century civilization. What a contrast.” (Hains 2002: 21).

Mawson was a man of great personal as well as physical strength. Hillary described his lone journey as “the greatest survival story in the history of exploration” (Turney 2012: 247). However, it was his day-to-day leadership style on which the success of the expedition depended. This was relaxed and egalitarian:

“When eighteen men are herded together in a space twenty-four feet square for over a year, in a climate so severe that the greater part of the time must be spent indoors, and when those limited quarters must serve for sleeping, cooking, eating, and for the pursuit of many specialized callings, then indeed is the test of true comradeship.” (Laserson 1957: 3).

That such men lived in harmony is also due to the skills of their leader. Being an exceptional organizer helped too (Riffenberg 2010: 423). Laserson writes of no serious quarrel or friction in that time and of the absence of social discrimination, as “no-one had secured his position by social or financial influence” (Laserson 1957: 4). The equal footing meant domestic chores were done by turns, including Mawson’s. His selection of men was clearly successful in terms of the way they operated as a team.

Mawson’s was an authority earned by being a leader who worked alongside his men. A constant feature of his leadership was based on example. He worked “like a Trojan” erecting masts on Wireless Hill (Ayres 1999: 60) and dived in to six feet of freezing water in an attempt to retrieve a lost radio part (Laserson 1957: 45). However, he knew a degree of distance is necessary for successful leadership and Mawson achieved this by not participating in certain activities, such as singsongs, and tended to keep his anxieties to himself

“Mawson, unlike Shackleton, was private and self-contained, radiating an existential autonomy, almost visibly repelling familiarity.” (Ayres 1999: 62).

Called the Boss or D. I. (from *Dux Ipse*, the leader himself), he preserved a certain aloofness, with some of his men saying he was too distant to be loved and difficult to get to know or judge (Ayres 1999: 65).

Expedition member Eric Webb recalled Mawson as

“an intellectual leader with utter motivation and selfless dedication to his objective which he handed out to all of us ... so that, by common consent, it became accepted and promoted as the policy of the expedition” (Ayres 1999: 64).

Mawson achieved this through his high expectations and his own efficiency, character, expertise and hard work. He was concerned with the quality of expertise among his men and their technical mastery of survival requirements. A practical man who quested for improvement as well as being intellectual, he could get frustrated by the men’s lack of capacity (Hains 2002: 51-2).

The crisis of Sidney Jeffryes’ insanity during the winter of 1912 caused Mawson to respond by asserting command. He made the decision to isolate the person whose madness might have contaminated the other members of the winter party. Resourceful under stress a good leader, thus,

“consolidates and stimulates a *camaraderie*, isolates the infection, prescribes a ‘cure’, and guarantees the survival of the team. Harsh measures, harsh world.” (Ayres 1999: 92).

Mawson was a man of very solid, conservative morals; a man of faith, who carried and read a small bible on his Far Eastern Sledging Journey and wrote in his diary he “felt grateful to Providence ... who has so many times helped me” (Ayres 1999: 78-80). He was also a man capable of deep love, in his relationship with his wife Paquita (McEwin 2008). On a later expedition (1929-30) the animosity between Mawson and the captain of his ship (John King Davis) undermined his leadership and got the expedition off to a rough start. This continued throughout with the pair being reduced to communicating by notes (Ayres 1999: 188). However, this was much after the Heroic Age.

In the end his life was one of dedication to the promotion of science and Antarctica, including protection of its wildlife. His “Herculean” efforts post-expedition also evidenced his leadership qualities that had already been demonstrated (Riffenburgh 2010: 423).

2.7 Scott, Amundsen and Shackleton

Robert Falcon Scott (1868-1912)

British National Antarctic Expedition 1901-04 (Discovery Expedition)

British Antarctic Expedition 1910-13 (Terra Nova Expedition)

Roald Amundsen (1872-1928)

Norwegian Antarctic Expedition 1910-12 (*Fram*)

Ernest Shackleton (1874-1922)

British Antarctic Expedition 1907-09 (Nimrod Expedition)

Imperial Trans-Antarctic Expedition 1914-16 (*Endurance*)

Shackleton-Rowett Expedition 1921-22

Much has been written about the three best known Heroic Age leaders, who have outshone other explorers to the extent they are largely forgotten or unknown.

This section discusses the way heroic images have changed over the last century and introduces some contrasting aspects of Scott and Shackleton. This is followed by a brief outline of theirs and Amundsen's personalities and leadership traits; they are discussed together on account of the interconnected nature of their expeditions, lives and heroic images.

Proven as a competent leader, thorough planner and seasoned explorer, Amundsen had overwintered on Gerlache's *Belgica* journey of 1897-99 and over three winters had lived and worked in the Arctic studying and experiencing survival tools. He had profound respect for the polar environment. He identified and looked to solve problems; before and during the journey to the South Pole he ruthlessly scrutinised and refined equipment, food and clothing. The *Fram* was a clean and comfortable ship, each man had his own small cabin and the food was excellent and nutritious.

Amundsen still had some lessons to learn, however (McPhee 2011: 105). In jumping the gun in leaving too early on his journey to the South Pole he risked the lives of both men and dogs. This prompted Hjalmar Johansen, a member of the party, to say "I don't call it an expedition. It's panic" (Alexander 2011: 125). Amundsen's resentment at being criticised subsequently cost Johansen a place on the Polar party. His management of his relationships with some of the men became increasingly poor (McPhee 2011: 144).

Amundsen realised that success was the only thing that would justify his subterfuge in his decision to "head south" and race Scott to the Pole. His decision to turn back after the first attempt shows that Amundsen could moderate his ambition to not risk failure in attaining the ultimate prize. He was driven by the Norwegian tradition of very little tolerance for failure in expeditions (Alexander

2011: 134). This was in contrast to the British tradition that focused on the struggle, in which death, if it occurred, was heroic.

We are reminded of Scott, Amundsen and Shackleton that “[a]ll three made deadly errors, had grave character flaws and, at some point in their careers, caused other men to die” (Fiennes 2004: xiii).

Shackleton’s epic journey of survival after the *Endurance* was crushed by pack ice is now legend. He had been a member of Scott’s Discovery Expedition in 1901-04, setting a new furthest South record of 82°17’S but was invalided home after contracting scurvy. He led his own Nimrod Expedition in 1907-09 and reached a new record of 88°23’S, returning home a “splendid failure” (Heacox 1999: 33).

After the sinking of the *Endurance* on the Imperial Trans-Antarctic Expedition, Frank Worsley described the burden of leadership on Shackleton when the men had reached Elephant Island safely:

“it was evident that anxiety for his party rather than physical strain had exhausted him. And as we scrutinised each other in silence for a moment I realised as I think I had never done before what a great man he was. He was not only the leader of a great expedition but a true brother and shipmate to each one of us, thinking of us always before himself.” (Barczewski 2007: 203).

Many of Shackleton’s examples of great leadership are taken from this voyage, from the time the *Endurance* was trapped until all men were rescued. He dealt with threats to his authority, rationed food, maintained morale, made life and death decisions and chose the right teams. Of the “heroes that history forgot” were the ten men of the Ross Sea party, dropped on the sea ice with the job of laying depots for Shackleton’s party as they came across the Pole from the Weddell Sea. They succeeded in laying the depots to supply the party crossing from the Weddell Sea in spite of quite desperate conditions. Only six men survived, an often unreported part of Shackleton’s rescue story of “all his men”; although he was to rescue them after the men on Elephant Island. It has been noted that the Ross Sea shore party were not adequately funded for what they had to do. Shackleton had little to do with their recruitment, sending them instructions in writing. Nevertheless, they were critical to the success of the expedition’s original plan.

It has been said that Shackleton’s and Scott’s lives “cast a shadow across the other” (Heacox 1999: 42). Animosity, competition, criticism, irritation, suspicion, even mutual contempt at times marked the relationship (Barczewski 2007: 49-53). We do know that Scott and Shackleton had much in common. Strong, ambitious characters; charming when they wished and stubborn when pushed, both hoped their Antarctic ventures would further their prospects. This description is shared by Huntford (1979) and Fiennes (2004), the two authors who did much, respectively, to damage and rehabilitate Scott’s reputation.

Scott came from the well off circles of the middle classes and was the more reserved man, an experienced and capable naval officer with an aura of authority. The *Discovery* was a naval vessel; *Terra Nova* was an independent

merchant registered as a yacht of the Royal Yacht Squadron, which enabled the application of naval discipline, customs and hierarchies on board. Scott transferred these from ship to land, as a way of maintaining discipline and order: everyone knew their role (Scott's Last Expedition 2013). He was not, however, inflexible, and was capable of emotion and sensitivity, evidenced by his feeling for animals. His humanity is most evident in his last diary entries.

Shackleton on the other hand was Irish and from the merchant marine, not the same "officer class" as Scott as the merchant service had little social standing. He sought ways to distinguish himself: a man of less than impeccable reputation, he was known as a philanderer and for his dubious financial dealings (Barczewski 2007: xvi; Ayres 1999: 45). In 1916 many saw him as "not quite trustworthy" (Barczewski 2007: xviii); as such, his archetype militated against a rise to heroic status, in both Britain and America. Not until the late twentieth century did he become the perfect leader, the "*beau idéal* of the heroic explorer" (Barczewski 2007: xvi).

Scott had a deep interest in science that Shackleton did not share. When Shackleton spoke to a journalist about the value of polar expeditions there was no mention of any scientific endeavour:

"Surely everything that shows a nation what discipline will do, what leadership can effect and what difficulties may be overcome, and what hardships may be borne, everything that fires the blood of a boy, that quickens imagination, that makes for enterprise, audacity, forward-looking, hard living and moral steadfastness – surely that's good." (Barczewski 2007: 136).

Yet he provides more balance when speaking to another journalist, about why he was drawn back to the Antarctic:

"Men go out into the void spaces of the world for various reasons. Some are actuated simply by a love of adventure, some have the keen thirst for scientific knowledge, and others again are drawn away from the trodden paths by the "lure of little voices," the mysterious fascination of the unknown. I think that in my case it was a combination of these factors that determined me to try my fortune once again in the frozen south." (Turney 2012: 37).

Scientific work was a strong feature of both Scott's expeditions, reflecting the role of the Royal Geographical Society: it had been intimately involved in setting the science goals for the Discovery Expedition. Scott ensured this followed a unified programme of scientific work rather than individual experiments (Barczewski 2007: 30), aspects of which later were to receive some criticism. When preparing for the Terra Nova Expedition Scott argued for a specialist scientific team, the duty of an explorer being to do more than just record his movements. Suggestive of Nordenskjöld's internationalist approach to science, in Scott's words:

"he 'must take every advantage of his unique position and opportunities to study natural phenomena, and to add to the edifice of knowledge those stones which can be quarried only in the regions he visits. Such a result cannot be achieved by a single individual or by a number of individuals trained on similar lines. The occasion calls for special knowledge and special training in many branches.'" (Turney 2012: 73).

The Terra Nova Expedition's scientific programme at the time was one of the broadest and most extensive ever conducted in Antarctica. More than 80 people were involved in the expedition, including a team of scientists who studied geology and surveyed new terrain, collected a vast amount of zoological specimens and made meteorological observations. Results were published in 80 individual reports produced by 59 different specialists: this was a significant and lasting contribution to the understanding of Antarctica.

To his contemporaries, Scott had given his life in order to increase the world's scientific and geographic knowledge; he had, moreover, refused to abandon his companions in the interest of his own survival (Barczewski 2007: 142). These were highly valued leadership traits of his time. Today Scott's legacy, shared by other expedition leaders who made significant scientific contributions, was founding the principle that Antarctica was a continent for science. Half a century later it was to be protected for that purpose under the Antarctic Treaty.

3 THE HEROIC AGE

3.1 Experiences in the Antarctic environment

An important context for understanding the requirements of leadership in heroic age exploration was the limited nature of the resources and knowledge available, along with the extremes of the polar environment. Antarctica is beautiful but one of the most hostile and unforgiving places on earth, where misjudgements and inexperience are fatal for humans. Amundsen himself had exclaimed:

“The wilderness of the landscape is not to be described: chasm after chasm, crevasse after crevasse, with great blocks of ice scattered promiscuously about, gave one the impression that here nature was too powerful for us.” (Otway 2011: 66).

Thus, each expedition became a feat of endurance that tested the physical and mental limits of all members:

“The heroism came about as a by product of dealing with the hazards presented by penetrating the completely unknown and extremely hostile polar environments without the aid of maps or, in some cases, without any prior knowledge or experience of ice or polar conditions, something that would today be regarded as exceedingly foolhardy.” (Summerhayes 2008: 324).

Antarctic expeditions were enormous operations and a great deal of planning was needed, including funding arrangements. Everything (including shelter) that was needed to live for a number of years had to be transported to Antarctica by ship. The *Terra Nova* took everything needed to live and work in Antarctica for three years. Examples of some food quantities alone included 1600kgs of pemmican, 1600kgs of concentrated lemon syrup, 2300kgs of sugar, 900kgs of milk powder and 680kgs of cocoa (Scott's Last Expedition 2013).

The journeys themselves were hazardous enough with overloaded ships sailing and steaming through the “roaring forties, furious fifties and screaming sixties”. Coal was the “sinews of the Expedition” (Charcot 1911: 21), which when

necessary was supplemented or replaced by seal blubber and even penguin oil for fuel. Drygalski, for instance, used penguin carcasses to feed the boilers of his ship. If marooned, men depended on food they could catch, had to build shelter and ward off despair.

In Antarctica, every day problems in the early 20th century were ice and dangers, cold and the weather, frostbite and snow-blindness, hunger, scurvy, and psychological difficulties in an environment of “icy nihilism” (Elzinga 2006: 152). Symptoms of scurvy include swollen muscles, spongy gums and teeth loss, impaired vision, exhaustion and haemorrhaging. Vitamin C as a preventative was not scientifically evidenced until 1912, although some leaders had already established sound nutritional practice (notably Captain James Cook). Sledging journeys proved a risk with men relying on rations of pemmican and not fresh meat. Of the 4,500 calories required daily on an average sledging ration, approximately half is needed simply to maintain body heat and avoid hypothermia, when temperatures reach -40 C° (Schillat 2006: 172). A member of Scott’s Polar party in 1912, Petty Officer Edgar Evans succumbed to scurvy before the others and Solomon (2001: 230) attributes this to his distaste for seal meat in the months leading up to the journey. Charcot’s 1908 journey on the *Français* stocked a range of antiscorbutics “sufficient to save us from the scurvy that attacked the expeditions of old” (Charcot 1911: 20), although this was not always effective. Amundsen’s crew were fed fresh underdone seal meat, not a widely accepted means of preventing scurvy at the time yet successful. Men who did not eat seal meat, or enough of it, were likely to succumb to the disease.

The five-month-long polar winter was another great challenge. Spirits were high and duties maintained during Nordenskjöld’s first winter, however, in the second, “nobody would even get out of their bunks for meal times. The mess room was too cold at times to sit down and eat” (Schillat 2006: 174). Blood mixed with flour and fried in seal blubber became a favourite meal.

Charcot describes the effort involved in trying to do simple daily chores:

“[h]ampered as we are by our gloves, if we take them off for a few seconds we burn our hands, benumbed by the metal, and the frozen canvas tears our nails. It took two of us to unfold the tent; it might have been made of steel. It was torture untying a knot with ungloved hands, hands that one could not feel at all, or felt far too much, dancing about the whole time to keep one’s feet warm, and every now and then breaking off the stalactites painfully attached to one’s moustache and continually dripping nose!” (Oulie 1938: 85).

The expeditions moved on muscle power: of ponies, dogs and men. Despite all of this, on the attraction of polar regions Charcot wrote “once having left moral and physical fatigue are forgotten, and one’s only idea is to go back” (Oulie 1938: 96). Life in the uninsulated huts was more than tolerable, even during winter, if discipline and scientific routine were maintained. They were places of refuge and often camaraderie also: Scott’s Cape Evan’s hut was described as having a “club-like atmosphere” (Reader’s Digest 1985: 192). Drygalski’s ship *Gauss* resembled “a cosy German hamlet in winter” (Reader’s Digest: 142).

Scott's disaster overshadowed the significant achievements of other expeditions at the time and there were even less celebrated leaders who faced risks and survived the Antarctic environment. Their feats of epic endurance equalled those of well known leaders, and they deserve a mention in discussing endurance of hardship in the Antarctic environment. An example is the First Officer Victor Campbell who led the Northern Party in 1911. Unable to penetrate the pack ice 48 kilometres from shore, the *Terra Nova* failed to pick them up from their depot at Evans Cove. Overwintering in an ice cave with minimal rations, the following spring they reached the safety of Cape Evans after a forty day march.

Another example is Aeneas Mackintosh who led the already-mentioned Ross Sea Party in support of Shackleton's Imperial Trans-Antarctic Expedition. Frank Wild also merits mention. He first went south with Scott and was to spend eight of the next fourteen years in the Antarctic region (Finkel 1976: 17). He was with Shackleton on his 1908-09 attempt to reach the South Pole and he was a member of Mawson's expedition and led the party that overwintered on the Shackleton Ice Shelf in 1912. In 1916 he led the party left on Elephant Island for 105 days, awaiting Shackleton's rescue. A man who "exercised a wonderful control without...outward sign of authority" (Heacox 1999:143), he treated the men with humanity and equality, kept them occupied and maintained the hope of Shackleton's return.

The conditions of Heroic Age expeditions show the extreme and relentless demands on their leaders. There were no holidays, no time off once the expedition had embarked. Mawson, for example, was criticised by the crew of the *Aurora* for his "weakness" in succumbing to sea-sickness on the journey to Antarctica. The leader was always on stage.

3.2 The place of science

A huge amount of science was done during the Heroic Age that laid the ground for modern Antarctic science, and the negotiation of the Antarctic Treaty 50 years later. Collectively, the effort was outstanding in achieving Sir Clements Markham's 1895 challenge. The astounding research efforts of many expeditions reflect the fundamental place of science in Victorian and Edwardian British culture and that spread to Europe. Larson argues for the centrality of science to British efforts in Antarctica, among the military, commercial, ideological and personal motives (Larson 2011: ix). Scientific in design and execution, Scott's first expedition was part of an international programme involving Germany (Drygalski) and Sweden (Nordenskjöld).

Such a co-operative approach to research was before the race to the South Pole, with the years 1910-14 marking an escalation of straightforward rivalry with sharp national overtones (Elzinga et al 2004: 258). The Heroic Age was not a homogeneous period: either in motivation or in organisation and impact, given the knowledge the early explorers and scientists lacked about the continent and its conditions, which were to benefit later expeditions.

Just as today's Antarctic community of interest remains small and tight-knit, that of the Heroic Age was even smaller, with the lives, interests and ambitions of these men often interconnected and their expeditions overlapping. Even so, they were all born of very different circumstances, cultures and with varying capabilities. Their leadership qualities and contribution extended in many instances well beyond their time on expedition. Not all contributed equally to the legacy of scientific knowledge that was a feature of the Heroic Age, however. Comparing the expeditions of Scott, Amundsen, Shackleton and Mawson, the polar historian J. Gordon Hayes wrote:

"Sir Douglas Mawson's Expedition, judged by the magnitude of both its scale and of its achievements, was the greatest and most consummate expedition that ever sailed for Antarctica. The expeditions of Scott and Shackleton were great, and Amundsen's venture was the finest Polar reconnaissance ever made; but each of these must yield the premier position, when fairly compared with Mawson's magnificently conceived and executed scheme of exploration." (Riffenburgh 2010: 420).

Shackleton balanced his goals in a different way from both Scott and Mawson. He was a man who "lived like a mighty rushing wind" (Reader's Digest 1985: 309), who did not love science for its own sake, but

"... recognised science rather as a useful accessory to his own plans ... Herein he differed from Scott, who was himself a scientist at heart and made notable personal contributions to glaciology. It is interesting to speculate how far geographical discovery was to Shackleton a means to an end – the end, the gratification of personal ambition" (Barczewski 2007:155).

Unlike Scott, neither Shackleton nor Amundsen were devoted to scientific research, although Shackleton was "blessed with the inclusion of [the Professor] David and Mawson" (Riffenburgh 2010: 421). Comparing Shackleton to Mawson, Frank Hurley said:

"Shackleton grafted science on to exploration – Mawson added exploring to science." (Turney 2012: 258)

Scott's handwritten notes in "Southern Journey 1911-12", 8 May 1911 explain why attaining the South Pole was so important: if they failed he believed their best scientific work would be neglected:

"The Southern Journey – this most important object of this expedition – that object is not only important in itself but in relation to all other objects. One cannot afford to be behind in this situation. The scientific public as well as the more general public will gauge the "result" of this scientific work of the expedition largely in accordance with the success or failure of the main object." (Scott's Last Expedition 2013).

4 DISCUSSION

4.1 Heroic Images

Scott is the archetype of a hero whose image has changed and changed again and opinions have been extreme and polarised. The portrayal of his leadership attributes and style over the century since his death in 1912 has moved from the

romantic, rose-tinted representation of the Heroic Age to Huntford's harsh critique in 1979, comparing his capability as a leader so unfavourably with Amundsen's. By the beginning of this century it has turned again, to a softer, more nuanced understanding that embraces cultural context and balances the driving motivations of science and the goal of the Pole (McTurk 2012). This contemporary view is more balanced, focusing on Scott the man and the wider context of his expeditions (Scott's Last Expedition 2013).

The nature of hero and image creation are essentially time-bound. Barczewski discusses the "malleability of heroism" (2007: xv) and argues that the respective images of Scott and Shackleton formed at the times of the deaths were determined by the Edwardian cultural values, but also very much shaped by the timing of their deaths in relation to the First World War. Ultimately, it was Scott's story, and that of his polar party, that resonated better with the public's need to comprehend death, over Shackleton's miraculous rescue.

Victorian values meant death in the service of one's country was highly glorified and elaborately mourned, however, the Edwardian era saw a change in attitudes towards death. This further shifted as a result of the First World War. In the search for meaning in the 722,000 men killed in Britain alone, the deaths of Scott and his party gave a "new, more profound resonance for the millions of Britons seeking an explanation and solace for the deaths of their loved ones" (Barczewski 2007: 143). Kathleen Scott received numerous letters from men who said

"that they could never have faced without complaint the dangers and hardships of their service had they not learned to do so from [Scott's] teaching" (Barczewski 2007: 141).

Scott's death suited the wartime context perfectly. Seen as "an exemplar of the kind of death [soldiers] *should* be suffering", (Barczewski 2007: 140) this was proof that death had a meaning:

"A polar hero could do nothing greater than die in his quest to give Britain geographical primacy." (Barczewski 2007: 139).

Shackleton, on the other hand, had not conveniently "accepted his fate as an exemplar of sacrifice" (Barczewski 2007: 144) and nor did he fit the British naval heroic tradition (a hero of the establishment) in the way that Scott did (Barczewski 2007: 115). By 1916 polar exploration was no longer a priority for the British public, and news of his survival was forced to compete with news from the front (the Battle of Jutland and progress on the Somme offensive) (Barczewski 2007: 132).

It was not until Shackleton's death in 1922, ten years after Scott's, that he enjoyed similar media coverage, and in this he, too, achieved some semblance of the role of heroic martyr. That his epic rescue of all twenty-seven men was a much lesser story in 1916 reflects both the time and the already established role of Scott.

Scott's greater prominence in British culture as a hero following the First World War related to the British belief in exploration as a selfless, idealistic pursuit for

national good and that of humankind. In stark contrast was the quest for individual achievement and glory, associated with Amundsen and eliciting the remark “three cheers for the dogs”, implying that without which he would never have got to the Pole (Larson 2011: 24). To a lesser extent the public perceived Shackleton more in this mould than in Scott’s, despite there being little difference in their actual ambitions. Shackleton had been the subject of some criticism for not participating in the war effort, despite the Admiralty turning down his offer to not proceed with his expedition. Local sentiment about sending 56 able-bodied men to explore rather than go to war was summed up:

“E ought ter ‘ave been at the war long ago instead of messing about on icebergs.” (Barczewski 2007: 135).

Yet today the epic rescue is the defining story of Shackleton as a leader in the Heroic Age. Today’s cultural expectations mean Shackleton has become the hero, rather than Scott: now “the stiff and indecisive Scott lies in Shackleton’s towering shadow” (Jones 2003: 8). The conventional military heroism of Scott fell from favour during the growth of anti-establishment sentiment in the 1960s and 1970s. The Vietnam War, the more democratic way of life and the rise of the individualist out of the ashes of a class-based society, all conspired to give Shackleton his day:

“We live now amongst the rubble of a Victorian culture fractured by two world wars.” (Jones 2003: 292).

Such an image reversal is culturally dependent and time-bound: another century or less is likely to see other turns of events. We necessarily view the Heroic Age leaders through the prism of history: the cultural, political and economic influences throughout the intervening time have all had their effect on the images of these men. We too are a part of history, not outside of it: today is simply tomorrow’s history. We, too, “see” through a particular lens or aperture, one dictated by the paradigm of our own time no less than the Edwardian view.

4.2 The prism of history

It is this that brings into question the description and interpretation of Heroic Age leaders in the management literature. Necessarily linked to today’s cultural paradigms and “what make a leader great” in the Western tradition of leadership, there is something rhetorical in their point of view. The evolution of images over time are a function of both the cultural climate in which the story of a “hero” is being told, and the opinions and attitudes of the person telling the story. Images shift in shape as these influencing factors change over time (Barczewski 2007: xv).

Barczewski (2007) argues that the changing images of Scott and Shackleton occurred after their deaths and so it was not to do with their actual character or achievements. After all, “they are the same men” (Barczewski 2007: xviii). Rather, the changes have occurred as a result of our reassessment of information already known. While new information has come to light over the last century, our knowledge of these men is not significantly different than in 1916. What has

changed their images over this time is our interpretations of these men, as a result of the world we live in today.

This makes it challenging to succinctly describe the leadership characteristics of Scott, Amundsen and Shackleton, locked together as they are in the web of history: the race, their rivalries and with Scott and Shackleton, the reversals of their heroic status. The lesser known explorers have not been the subject of such differing interpretations over the years, so the facts as we know them from the Heroic Age are viewed through a less distorted lens.

What we read and understand today have been refracted over time and through our own cultural context. Extending this metaphor, in viewing the past through the prism of history we see refracted light: the spectrum of different wavelengths is the political, economic and cultural influences over that time, affecting us and through our changing interpretations, the images themselves. To understand and appreciate the Heroic Age and its men we need to make sense of this rich complexity. If instead we put a filter before our eyes and look only through a small aperture, we see a blinkered view, a narrow interpretation that obscures the full context of this rainbow of colour. To understand the stories we need to remove any filters that act to distort our interpretation.

The management books that use the Heroic Age leaders as “lessons” for modern business leaders take such a narrow and, hence, distorted view: they preclude full understanding by not viewing the full spectrum. Scott the bungler, Shackleton the saviour (or seducer, take your pick) and Amundsen the adventurer are but shallow epithets in the wider context of their lives, efforts and achievements.

4.3 Heroic age leaders in management literature

The Antarctic Heroic Age and its explorers, especially Scott, Amundsen and Shackleton, are being used to demonstrate “leadership lessons” to today’s managers in business and public service. These books are being promoted as both topical and relevant to twenty-first century leadership challenges.

Such books fall broadly into two types. The first uses one leader to exemplify good characteristics of leadership that should be emulated in today’s business world to achieve success. Examples include *Shackleton’s Way* (Morrell and Capparell 2001), *Leading at the Edge* (Perkins 2000) and *Shackleton: Leadership Lessons from Antarctica* (Ainsberg 2009). Heroic Age leaders are not alone in this genre: it uses a wide range of characters. There is even a book on leadership lessons from Tony Soprano, the fictional Italian-American Mafia boss in the HBO television drama series *The Sopranos* (Schneider 2004). This too selects examples from his character and actions to illustrate the principles of leadership, adding “the sins of omission: what Tony Soprano does wrong”.

The other type are those books that compare leaders, one against another or others: favorites are Scott and Amundsen, and Scott and Shackleton. An example is *Great by Choice* (Collins 2011); also McKay (2012) and Hansen (2011). This

genre of literature describes lessons that could be drawn from virtually anywhere where there were leaders to compare unfavourably: Adolf Hitler and Winston Churchill, Lieutenant Colonel George A. Custer and Chief Sitting Bull, or the "deadly rivals" (Huntford 1997: 159) Fridtjof Nansen and Robert Peary.

4.4 "Lessons from Shackleton"

By comparing the examples of Shackleton-inspired principles with the general principles of leadership that prevail in the West today, we get some insight into what can be drawn legitimately from Heroic Age leaders.

Shackleton's leadership lessons according to Morrell and Capparell (2001) are:

1. The path to leadership
2. Hiring an outstanding crew
3. Creating a spirit of camaraderie
4. Getting the best from each individual
5. Leading effectively in a crisis
6. Forming teams for tough assignments
7. Overcoming obstacles to reach a goal
8. Leaving a legacy

According to Ainsberg (2009) the ten leadership lessons from Shackleton are:

1. Feel the purpose in your gut
2. Choose a powerhouse for your number two
3. Choose a cheerful, flexible team
4. Create an optimal work environment
5. Adapt confidently to setbacks and mistakes
6. Keep dissidents close
7. Respect the dignity of every individual
8. Communicate!
9. Balance work with joy
10. It's all about team-building

The ten strategies for leadership according to Perkins (2000) are:

1. Never lose sight of the ultimate goal, and focus energy on short-term objectives
2. Set a personal example with visible, memorable symbols and behaviours
3. Instill optimism and self-confidence, but stay grounded in reality
4. Take care of yourself: maintain your stamina and let go of guilt
5. Reinforce the team message constantly: "we are one – we live or die together"
6. Minimize status differences and insist on courtesy and mutual respect
7. Master conflict – deal with anger in small doses, engage dissidents, and avoid needless power struggles
8. Find something to celebrate and something to laugh about
9. Be willing to take the Big Risk
10. Never give up- there's always another move

The leadership principles which are commonly identified in the management

literature of the Western world are generic and apply to all disciplines: business, public service and the military. There may be various lists or different groupings of headings and subheadings, but they are generally agreed as covering:

1. Know yourself and seek self improvement
2. Be technically proficient
3. Seek responsibility and take responsibility for your actions
4. Make sound and timely decisions
5. Set the example
6. Know your personnel and look out for their well being
7. Keep your people informed
8. Develop a sense of accountability, ownership and responsibility in your people. Develop a sense of responsibility in your followers
9. Ensure each task is understood, supervised and accomplished
10. Build a team

(<http://www.actioncoach.com/Ten-Principles-of-Leadership?pressid=665>).

These are often adapted and expressed in the context of an organization, for instance the Leadership Principles of ISS (Integrated Service Solutions) are that we put the customer first, have passion for performance, encourage innovation, treat people with respect, lead by example, lead by empowerment, develop ourselves and others, teamwork is at the heart of our performance and we are one company, one brand, one strategy

(http://www.issworld.com/career/is_as_employer/pages/leadership_principles.aspx).

The similarity is noticeable between the lessons we are to learn from Shackleton and the independent and already-known list in the core management literature. The Shackleton-inspired lists are simply different versions of today's leadership principles: there is no material difference in the lessons from Shackleton. This suggests there is nothing special about this particular Heroic Age leader in terms of leadership lessons: he simply demonstrates them. The use of Shackleton's character traits and actions to show "leadership in action" may be on point, both at the time and also today. Equally, other leaders of the Heroic Age could be used to exemplify some or all of these qualities, as the biographical outlines demonstrate.

4.5 "Lessons from comparisons"

Books comparing two (or more) leaders share the same characteristics as those of the first type just discussed, and in the case of Collins' *Great by Choice*, also fall victim to the trap Huntford set in 1979 (Huntford 1979). In his book *Scott and Amundsen*, Huntford's view of "Scott the bungler" was born: Scott as the bungling opposite to Amundsen, stupid, recklessly incompetent and irresponsible in the extreme, ultimately costing him and his teammates their lives. Huntford has been criticized for taking a less than rigorous approach in his debunking of Scott, which is a trap for those who uncritically use his material, as they inevitably import his bias. When debunking the accepted opinion on a matter,

"the debunker's scholarship must be not only as good as that of earlier biographers, but must be above reproach" (Young 1980).

Huntford's book *The Last Place on Earth* (1999) is recommended reading and referred to by Collins as being "superb ... a massive, well-written comparative study of these two men [Scott and Shackleton]" (Collins 2011: 14). This book is based on his earlier one, *Scott and Amundsen* (Huntford 1979) and his position *vis à vis* the protagonists does not change:

"Since then, more material has emerged; little to make me revise my judgment, and much to reinforce it" (Huntford 1999: xxiii).

Despite the date of Collins' book being 2011, there is no mention of the raft of literature since 1979, including biographies, that refute Huntford's reputational attack on Scott. These include Fuchs (1980), Solomon (2001), Jones (2003, 2011), Fiennes (2004), Crane (2006) and May (2012).

Collins takes Scott and Amundsen as a "near-perfect matched pair" (Collins 2011: 13) and asks business managers "are you Amundsen or Scott?". His "vivid analogy" is between the managers' behaviours in response to a similar environment, and those of Amundsen and Scott to theirs on the race to the Pole. Ignoring differences in background, culture and expectations as well as the balance of their objectives, Collins unsurprisingly finds "Scott presents quite a contrast to Amundsen" (Collins 2011: 15). The race to the Pole is the only perspective taken and the men's other experiences are seen exclusively in light of that end. Amundsen's bicycling 2000 miles from Norway to Spain in 1899 is seen as part of his building a foundation for his quest: "Scott could have taken a thousand-mile bike ride. He did not." (Collins 2011: 15).

It is not that these two expedition leaders did not made mistakes, Scott especially since he is the one under fire from Collins. The point is that such a selective reading of Scott's and Amundsen's expeditions, indeed, their lives and historic contexts, will never give an informed picture. Collin's comparison is not supported by the historic and academic research about Scott, and possibly also Amundsen. Instead, interpretations of Scott and Amundsen have been selected to give examples of established leadership principles. Examples of contemporary leaders would better serve this end and also avoid the risks associated with the prism of history.

4.6 Leadership qualities of heroic age explorers

Successful leadership of expeditions in extreme places such as Antarctica depends on the attributes of the leader and probably some good luck to boot. The question is whether there are common attributes among heroic age leaders, or whether they are unique to the circumstance: of the times, the man, the situation and the environment of Antarctica in the particular season and place. If there are particular and special attributes of leadership that are necessary for successful Antarctic expeditions, then comparisons between and among leaders might prove useful. If, however, there is no one style, and success depends on the man and the circumstances he finds himself in (for instance, some chose to lead expeditions, others were assigned and yet others paid), we might see a range of leadership features reflecting their different contexts: cultural, political, economic, physical, time, purpose and so on.

Drawing on the biographical outlines of the selected leaders in this paper and an interview with the social historian Ursula Rack (2013), a picture of their leadership qualities emerges. This demonstrates some common themes, however, this does not extend to a general pattern.

Gerlache was a real pioneer in his exploration of Antarctic waters in the late nineteenth century. He lacked knowledge of the region, the conditions they might expect and the resources required to survive: nevertheless, they did return after expending huge effort to free the *Belgica* from the ice. By today's qualities expected of leaders his decision-making style would be questioned, as he did not always involve others in his vision or plans. He was a naval officer not a scientist and had difficulties in his relationship with the scientists on the expedition, however, his overall commitment to scientific endeavor showed a different type of leadership, the expedition being hailed as a success despite their misfortunes. Account needs to be taken of his time and the fact that he was a Heroic Age explorer in the very beginning of that era. Over the next two decades the world was to change dramatically in terms of cultural and class values, scientific knowledge which was rapidly growing, and national interests.

Drygalski was a both scientist and a good leader. He possessed authority in his scientific work and had a clear vision for his expedition and a respect for other disciplines. When choosing the expedition members Drygalski he was careful and made comments on each *curriculum vitae*, conducted interviews and entered into personal correspondence. Once selected, he involved people early in the preparation for the expedition and had a good interaction with them. One of the leadership lessons from Shackleton is his "hiring an outstanding crew" and Drygalski is also an impressive example. The following excerpt from Hugh Mill in 1905 describes this ability: of those mentioned, Ruser and Bidlingmaier both wrote of his good leadership and Drygalski and Gazert the physician were lifelong friends:

"The scientific staff included as naturalist, Professor Vanhöffen, who had been with Drygalski on his Greenland expedition and also on the Valdivia; as surgeon, Dr. Hans Gazert; as geologist, Dr. Emil Philippi, who had spent some time with Sir John Murray in the study of deep-sea deposits; and as magnetician and meteorologist, Dr. Friedrich Bidlingmaier. The captain of the ship was under the instructions of Professor von Drygalski, as leader of the expedition; he was Captain Hans Ruser of the Hamburg-American line, and had accompanied the Valdivia as first officer on her short but brilliant cruise. The subordinate officers and crew were carefully chosen, and ultimately there were on board five members of the scientific staff, five officers, and twenty-two men. The scientific staff included as naturalist, Professor Vanhöffen, who had been with Drygalski on his Greenland expedition and also on the Valdivia; as surgeon, Dr. Hans Gazert; as geologist, Dr. Emil Philippi, who had spent some time with Sir John Murray in the study of deep-sea deposits; and as magnetician and meteorologist, Dr. Friedrich Bidlingmaier. The captain of the ship was under the instructions of Professor von Drygalski, as leader of the expedition; he was Captain Hans Ruser of the Hamburg-American line, and had accompanied the Valdivia as first officer on her short but brilliant cruise. The subordinate officers and crew were carefully chosen, and ultimately there were on board five members of the scientific staff, five officers, and twenty-two men." (Mill 1905: Chapter XX).

Filchner never returned to Antarctica after his expedition but went on to achieve a lot in Asia (Filchner 1939). He had no influence in his expedition members: they were chosen by the “Antarktischer Verein”, the committee responsible for its funding and organization. The ship *Deutschland* sailed under the German flag with the Captain Richard Vahsel. His illness exacerbated the already difficult relationship with Filchner, and with the lack of discipline regarding alcohol, this spread to damage relationships among the crew and scientists more widely, risking the expedition’s success.

A pompous man, Filchner found it difficult to work with people of equal education and was very status oriented, liking order and hierarchy when he was an army commander and doing things by the book. He was rewarded by a message of thanks from the Führer in 1937. Yet he was also artistic. His leadership ability was not fully tested during his Antarctic expedition; however, his career in later life indicated he was not a natural leader. He spent it making detailed preparations for exploration of deserts, steppes and mountains of central Asia. He saw himself as a scientist who “emerges from the wilds” to associate with other scientists (Filchner 1939: 377).

Charcot was a mariner and scientist and physician, probably in that order; a leader who got on well with his men. His expeditions were not government funded and he was dogged with bad luck with his ships, although despite this made a contribution to science and geographic exploration. He strongly promoted the co-operation between nations which was a hallmark of the expeditions of his time. He was not tested in the way some others were, nevertheless he can be said to be a leader in building camaraderie among his crew and for his significant scientific contribution.

Nordenskjöld wanted to be part of the international co-operation of 1901-03 but struggled to get funding from the Swedish government. A scientist himself, he had friends among the scientists on his expedition, choosing to exercise his authority through his personal relationships with a few. He was not a strong leader and did not relate well to the lower ranks as Drygalski and Shackleton did. In some ways he too was not tested, being overwhelmed by the situation when three groups of his expedition were separately marooned. However, the teams he formed ultimately passed the test of these “tough assignments”, particularly Captain Carl Anton Larson, marooned on Paulet Island.

Mawson had a very clear scientific programme and he made all the right contacts with scientists and between universities. Like Filchner and Shackleton, he had charm and charisma and used this to open purses and gain funding. He was in league with the European scientific community, and could push hard when required. Although not navy oriented or bound by that tradition he remained an aloof man.

Controversy has arisen regarding his relationship with Mertz on account of the missing pages from Mertz’ diary. In a similar way to Scott with Petty Officer Edgar Evans and Captain Oates before their deaths, Mawson had made

dispassionate observations about the risk Mertz' failing health posed to the lives of others (in this case himself). Yet Mawson cared for his people in a way Amundsen did not.

Amundsen was also ruthless and while aware this was not the right way to think, considered those too weak did not deserve to live: "[c]ross him in any way and you would become superfluous, to be disposed of like any other form of offensive matter" (McPhee2010: 144). After Hjalmar Johansen challenged him after the first too early start to the Pole, he was never forgiven or spoken to without need (Reader's Digest 1895: 189). Amundsen's total focus on his goal reflected his newly independent country's striving to show it could do the same as other nations. The issue of whaling rights and claims to territory in the sub-Antarctic islands were also in the mix.

Scott led two very different expeditions and his leadership developed over this decade. Through trial and error much had been learnt between 1901 and 1911, however, there were only limited materials available at the time to respond to the requirements of the polar environment. Huntford in his book *Scott and Amundsen* (1979) mixed the two expeditions up in the examples he used to demonstrate "Scott the bungler". However, the book caused people to look more closely at the expeditions, what had really occurred and why, such as Solomon (2001). It was the combination of a great many factors that made the difference between the two expeditions' success, not simply the leadership strength or styles of Scott and Amundsen.

Shackleton had a good feeling for people, was quite intuitive and emphasised their reliance on one another. He kept Hurley close to him because he was a strong character and potential troublemaker. Worsley was still the master of the ship yet Shackleton made the decisions in the background so Worsley would not lose the respect of his men. When it came to the epic survival story, circumstances that enabled their survival included Worsley's navigational skills during the voyage in the *James Caird* and good enough weather to cross the mountains of South Georgia. Amundsen denied the role of luck in achieving success:

"I may say that this is the greatest factor—the way in which the expedition is equipped—the way in which every difficulty is foreseen, and precautions taken for meeting or avoiding it. Victory awaits him who has everything in order — luck, people call it. Defeat is certain for him who has neglected to take the necessary precautions in time; this is called bad luck." (Amundsen 1912).

Barczewski (2007: 83) see it as an open question whether Scott's mistakes, taken together, first cost him priority at the Pole, and second, caused the deaths of five men. Her point is that even if it did, it is not clear that this was "an inordinate number of errors":

"as his and Amundsen's expeditions were only the third and fourth ever to winter on the Antarctic continent; there was simply not enough data available for Scott to have prepared for every eventuality" (Barczewski 2007: 83).

There is no doubt that many examples from Shackleton's expeditions can be found to exemplify the principles of leadership today. This section illustrates that

some if not all of these principles are also found in some other leaders of the Heroic Age. Each leader excelled at some but was maybe less capable in other areas, including Shackleton. Charcot created a spirit of camaraderie, Drygalski hired an outstanding crew, Mawson organized an outstanding expedition and led by example, Scott and Mawson left a huge scientific legacy and so on. In fact all of them left a legacy: some by contributing to the growing body of scientific knowledge, Amundsen and others by reaching new places or mapping unknown territory. It is this diversity which means a particular leader cannot be used to provide “lessons from Antarctica” (Ainsberg 2009). If it did we could talk of “lessons from Rome” from Julius Caesar; Abraham Lincoln providing “lessons from America”; Nelson Mandela providing “lessons from prison” and so on: clearly absurd.

To take the further step and compare these leaders is to assume that leadership is generic, whereas it can depend on the perspective, the point of view taken, as well as the character of the person. By taking the human view, the view of the scientific programme or that of managing and organizing an expedition, a different pattern of who exemplified good leadership would emerge. Generalising in history is always dangerous (Rack 2013).

Shackleton and Amundsen were not recognized like Scott, Mawson, Drygalski, Nordenskjöld, Charcot, Gerlache and even Filchner, for their scientific method or contribution in that field. Amundsen was instead regarded highly for his speed and efficiency and Shackleton for his concern for his men and their rescue against all odds. Cherry-Garrard gives some perspectives that show the breadth of leadership qualities during the Heroic Age:

“... For a joint scientific and geographical piece of organization, give me Scott; for a Winter Journey, Wilson; for a dash to the Pole and nothing else, Amundsen: and if I am in the devil of a hole and want to get out of it, give me Shackleton every time ... ” Cherry-Garrard (1922: viii).

5. CONCLUSION

The conclusions in this paper are suggested and illustrated rather than proven. They provide themes that may be further developed and show the difficulties in comparing leaders of the Heroic Age.

The evolution of heroic images over time are a function of both the cultural climate in which the story of the hero is being told and the opinions and attitudes of the person telling the story. As these change over time, so the images change. This is equally true of the way we view leadership qualities, which should be considered against both the context of history and the current paradigm, if we are to learn from them. Of Scott and Shackleton, Barczewski concludes:

“[i]n reality it is impossible to compare the accomplishments of the two men, for they occurred in different places and in very different circumstances” (2007: xix).

There are no general characteristics of leadership in the Heroic Age shared by all leaders, although there are common themes. This is a fundamental problem if you are trying to draw leadership lessons, unless it is from one particular leader only. The current management literature that promotes leadership lessons from Scott, Amundsen and Shackleton as relevant to business management may not have validity and lacks any materially new information. This is because these do not provide “lessons” regarding leadership principles, only examples of already established ones that are exemplified by many people during the Heroic Age, indeed, throughout history.

When we understand the drivers and expectations of the Heroic Age expedition leaders, appreciate the privations endured and their courage and stamina, both physical and psychological, to achieve what they did and the contribution they made to science, then we can only admire them all.

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