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RACE TO THE SOUTH POLE

By Dennis N. T. Perkins

The contest to become the first human to set foot on the geographic South Pole is an exciting and controversial chapter in the history of leadership under adversity. Set in the most hostile environment on Earth, the race to the South Pole shows how leadership style, personality, strategy, and openness to innovation interact to determine success or failure. This historic quest demonstrates how the best leaders are able to extend their reach by bringing out the best in others. Finally, it illustrates that perceptions of leadership are altered by the changing lenses of culture and popular sentiment.

The Course

It is difficult to understand the nature of the competition to reach the South Pole without some knowledge of the extreme conditions of Antarctica. For most of the year, central Antarctica is enveloped in total darkness or total daylight. Ice—up to 4,500 meters thick—covers over 99 percent of the continent's land mass. But the most formidable obstacles are neither darkness nor ice. Those who dream of reaching the Pole must contend with bitter cold, relentless wind and snow, and high altitude.

The coldest temperature ever measured on the Earth's surface—minus 89.2 degrees C—was recorded in Antarctica. Even during the warmest months, temperatures in the interior can reach minus 70 degrees C, and the mean annual temperature at the South Pole is minus 49 degrees C.

In addition to the frigid temperatures, there is the wind. Dense cold air rushing down from the polar plateau can achieve speeds of almost 320 kilometers per hour. And then there are the storms. The ferocious Antarctic winds blow snow across the surface, resulting in blizzards that make travel nearly impossible. In these blinding conditions, explorers have died only a few yards from their shelters.

Finally, there is the altitude. The South Pole is located at an elevation of over 2,700 meters above the sea, and the pressure altitude that affects human physiology is even higher. Because of the spinning of the Earth, the air is denser over the Equator and thinner over the Pole. As a result, the effective altitude of the Pole is almost 4,200 meters. Taken together, these elements of cold, wind, snow, and altitude played a crucial role in the race to the South Pole.

Preparing for the Race

In 1820, Fabian von Bellingshausen (1778-1852), a captain in the Russian Imperial Navy, was the first to sight the continent of Antarctica. A year later, sealers from the United States and Britain landed on the Antarctic Peninsula. Other expeditions designed to explore the unknown continent soon followed. Each effort increased the understanding of Antarctica and helped in the development of strategies for dealing with the harsh polar environment.

In March 1898, a Belgian expedition led by Adrian de Gerlache (1866-1934) became trapped by the pack ice near the Antarctic Peninsula. Imprisoned aboard the *Belgica* for more than a year, the crew members suffered from depression, disease, and disorientation resulting from living in total darkness. But they were the first to winter south of the Antarctic Circle, and a young Norwegian named Roald Amundsen (1872-1928)—one of the ship's officers—absorbed the lessons of this experience.

The same year, Carsten Borchgrevink (1864-1934) sailed on the *Southern Cross* as a leader of what was called the British Antarctic Expedition. The expedition, funded by a wealthy British publisher, was hardly British: Twenty-eight of the thirty-one members were Norwegian, and the *Southern Cross* was a converted Norwegian sealer. Landing at Cape Adare, ten of the explorers erected two wooden huts and set out to prove that humans could survive ashore in the cold, dark, Antarctic winter. The expedition also produced maps of the Ross Sea region, and it expanded the store of knowledge and skills needed to survive in the extreme Antarctic environment.

The British Contestants

At the International Geographical Congress held in London in 1895, the English geographer Clements Markham (1830-1916) called for further scientific and geographical exploration of Antarctica. Markham later helped organize the British National Antarctic Expedition, and in 1899 chose explorer Robert Falcon Scott (1868-1912) as its leader.

Markham believed in youth over experience. He thought older men lacked not only energy and a capacity to deal with emergencies, but also openness to new ideas. “How can novel forms of effort,” he wrote, “be expected from still old organisms hampered by experience” (Thomson, 2002, 10). Scott had no prior experience in polar exploration, but Markham had been impressed by Scott's intelligence and charm. Markham believed the thirty-one-year-old naval officer to be the right age and temperament to lead an Antarctic expedition.

On the recommendation of an expedition benefactor, Markham also selected an officer of the Merchant Navy—Ernest Henry Shackleton (1874-1922)—as one of Scott's sublieutenants. The two officers, both of whom became important figures in the race to the South Pole, had sharply contrasting backgrounds and personalities.

Scott was born to a well-to-do family in Plymouth, England. At the age of thirteen, he entered the Royal Navy as a cadet aboard the training ship *Britannia*. Although Scott could be charming, he could also be detached and temperamental. With his reserved and shy personality, Scott had trouble mixing with others. He was most comfortable in the traditional, regulated, and hierarchical caste system of the Royal Navy. These personal characteristics limited his effectiveness as a leader, but Scott brought strengths as well. He genuinely appreciated science and possessed the physical stamina essential for polar exploration. In addition, his skill at vivid, descriptive writing provided a clear account of his expeditions and his role in the race.

Ernest Shackleton, by contrast, was an Anglo-Irishman born in County Kildare, Ireland. Shackleton's father, unable to afford the cost of the Royal Navy's *Britannia*, sent Ernest to sea on a ship of the Merchant Navy. Aboard the *Hoghton Tower* Shackleton "learned the ropes," and he also learned the value of developing relationships.

Although status distinctions in the Mercantile Marine were less rigid than they were in the Royal Navy, sanctions still existed against mixing with social inferiors. But Shackleton's outgoing personality and lack of pretension enabled him to make friends at all levels—with officers, engineers, and apprentices alike. This ability served him well in his journeys to the Antarctic.

The First Run toward the Pole

In August of 1901, Scott and Shackleton sailed for Antarctica aboard the

Discovery, the first ship designed and built in Britain specifically for polar exploration. By mid-February of 1902, the expedition had established winter quarters ashore. In November, Scott finally set out to explore the route to the Pole with Shackleton and scientific officer Edward A. Wilson (1872-1912).

Scott and his team were ill prepared for their first southern foray. They were poor skiers, and inept at handling dogs. The dogs were underfed and the sleds were overloaded. Suffering from scurvy and lack of food, the party turned back more than 800 kilometers from the South Pole.

On the journey home, the three tied their remaining dogs behind the sleds, which they "man hauled" back to their camp at Hut Point. Strangely, Scott seemed drawn to this grueling practice of man hauling. He wrote that "no journey ever made with dogs can approach the height realized...when a party of men go forth to face hardships, dangers, and difficulties with their own unaided efforts" (McGonigal and Woodworth, 2001, 428).

The strain of the trip, combined with clashes between Scott and Shackleton, undermined the cohesion of the southern party. At one point, Scott referred to Shackleton as a "bloody fool." This clash—and the underlying competition between the two men—created a rift that was never closed.

When the party reached Hut Point, all three men were suffering from scurvy. Scott, with medical advice, declared Shackleton unfit for duty and sent him home on a relief ship. Shackleton reportedly wept as he sailed away.

Shackleton's Second Attempt

Although Shackleton had been ordered home from the *Discovery* expedition, he returned to England a hero of the expedition. He began organizing another attempt, and in 1907 sailed for Antarctica aboard the *Nimrod* as the leader of a second British Antarctic Expedition.

At the end of October 1908, Shackleton and three companions set out for the South Pole. Shackleton brought no dogs for the final assault, relying instead on Siberian ponies for transport. The ponies were ill suited for the terrain, and once more, the British resorted to man-hauling.

By January 9, 1909, they were 179 kilometers shy of the South Pole and desperately short of rations. In a typical act of generosity, Shackleton gave one of his last biscuits to a companion, Frank Wild, and then made the painful decision to turn around. He later explained to his wife: "I thought you'd prefer a live donkey to a dead lion" (Rubin, 2000, 39).

They had failed to reach the South Pole, but the British Antarctic Expedition had accomplished other goals. They had uncovered coal and other fossils. They had discovered a new mountain range, traversed the high polar plateau, and they held the record for penetrating the farthest south. In addition, they pioneered a path up the Beardmore Glacier, the same route that Scott would take on his next expedition.

The expedition also gave Shackleton a chance to demonstrate his exceptional leadership skills. He had faced danger with humor and good cheer, developing

a reputation for being cool in a crisis. Although called "the Boss" by his men, Shackleton established the norm of discussing problems openly and valuing the opinions of others, regardless of their position in the formal hierarchy.

The Norwegian Challenger

Roald Amundsen, born before Norway separated from Sweden, learned to ski as a schoolboy and had a keen interest in adventure. As a teenager, Amundsen read the account of Sir John Franklin (1786-1847), a British explorer who died mysteriously in the Arctic. Enamored with polar exploration, Amundsen honed his skills in long-distance skiing as he prepared for his "great adventure."

Despite the challenges he encountered as a member of the Belgian Antarctic Expedition in 1898, Amundsen continued his polar exploration. He was the first to navigate the Northwest Passage aboard one vessel, and he spent three winters in the Arctic. He lived with the Eskimos, learning about cold-weather clothing, dog handling, and travel—the foundational skills of polar exploration. Among explorers, he developed a reputation as a meticulous planner who was expert at traveling over snow and ice.

Amundsen had always dreamed of being the first to the North Pole. In 1909, as he was planning his North-bound expedition, Amundsen received word that Americans Frederick A. Cook (1865-1940), a shipmate from *Belgica*, and Robert E. Peary (1856-1920) had both claimed that prize. Amundsen quickly changed his goal from north to south. After his expedition had departed from Norway—ostensibly for the Arctic—Amundsen sent Scott a terse telegram:

“Beg leave to inform you...proceeding Antarctic” (Rubin, 2000, 40).

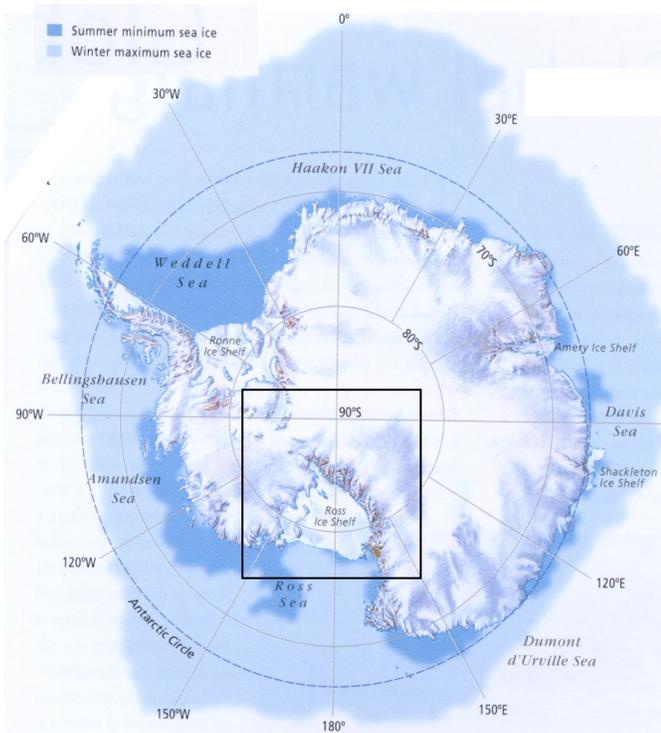
When the *Terra Nova* reached Melbourne in October 1910, the news of Amundsen’s altered goal came as a shock to Scott. The race was on!

The Last Lap

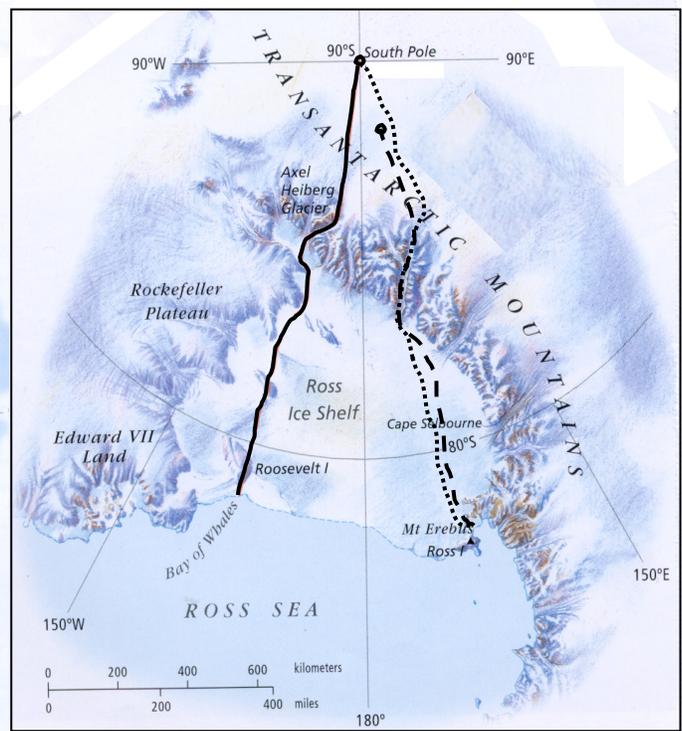
Scott reached Ross Island on 4 January 1911, and was soon laying depots south from his base at Cape Evans. Amundsen arrived in Antarctica shortly thereafter and established his camp on the ice shelf at the Bay of Whales.

Amundsen departed for the Pole on 8 September but was forced to retreat in disarray by the bitter cold. On 19 October, Amundsen set out once more for the Pole with four companions and four sleds, each pulled by thirteen dogs.

Antarctica



Amundsen Scott Shackleton



With their exceptional skiing and dog-handling ability, the Norwegians moved across the terrain with relative ease. They traveled only six hours a day, reserving the remainder for sleep and rest. Thanks to their carefully planned diet and well-marked depots, food was never an issue.

Amundsen and his men arrived at the South Pole on 14 December 1911. Because all five had risked their lives on this adventure as a team, Amundsen insisted that they plant the Norwegian flag together. The men erected a tent with a Norwegian flag on top. Expecting that Scott was still to reach the Pole, they left him a letter and another to deliver to King Haakon in case they failed to return.

By 25 January 1912, Amundsen and his party had returned to base camp with eleven remaining dogs, only 99 days after their departure. They were as well-nourished and fit as when they had left. Because of their meticulous planning and efficient travel, the Norwegians had made it look easy.

While Amundsen basked in the warmth of his victory, Scott and his party still struggled southward, unaware that they had already lost the race. Scott had begun his journey almost 112 kilometers farther from the Pole than Amundsen had, and his decision to use ponies as well as dogs had created a further delay. As a result, they established their last food depot, "One Ton Camp," approximately 66 kilometers short of their goal. This shortfall, along with poor weather and a number of errors and miscalculations, was to prove fatal for Scott and his polar party.

On 3 January 1912, Scott made a late decision. Although plans for the polar assault had been based on a team of four, Scott inexplicably announced that he would take one extra man on the final leg of the journey. The sleds were only equipped with supplies for four men and the tents were designed to accommodate four, so this change complicated their movement. They had also brought only four sets of skis, so the entire polar party was restricted to a walking pace.

Scott and his men arrived at the South Pole on 17 January 1912—35 days after Amundsen. Finding the Norwegian tent, Scott wrote: "Great God! This is an awful place, and terrible enough for us to have labored to it without the reward of priority....Now for the run home and a desperate struggle. I wonder if we can do it" (Neider, 2000, 288).

They could not. One member died a month later after sinking into a coma. The next month, a second man—Titus Oates—stepped out into a blizzard never to return. Suffering from severe frostbite, Oates apparently sacrificed his life rather than continue to delay his comrades.

On 19 March a blizzard again enveloped the surviving three members of the polar party. Imprisoned just over 19 kilometers from One Ton Depot, they had only enough food for two days. Scott's last entry on March 29 reads: "We shall stick it out to the end...and the end cannot be far....For God's sake look after our people" (Neider, 2000, 267).

Eight months later, expedition survivors came upon the tent of the polar party. When Scott and his two companions

were eventually found, their sledge had included 14 kilograms of geological specimens. The weight of these specimens, confirming Scott's dedication to science, was not the main cause of his tragic death. But the stones, although of scientific importance, symbolize the inherent contradiction of trying to finish a race while carrying rocks.

Back in Britain, Scott was hailed as a hero who had died for his country, while Shackleton, who had turned back on his attempt at the Pole, was criticized by some as being unpatriotic: His failure to sacrifice his life, and the lives of his men enabled a foreigner to win the race.

Leadership Lessons from the Race to the Pole

Fascination with the race continues to the present day. For most of the twentieth century, Scott was considered a heroic figure. Toward the end of the century, some historians began to question his leadership. Instead of a hero, Scott was cast as a bungler whose errors in judgment had cost him not only the conquest of the Pole but also the lives of his men. Today, another contrarian view has emerged. His failure was simply bad luck: Unusually cold weather was a major contributor to Scott's tragic end. And Amundsen, the winner of the race, has been criticized for his single-minded determination and perceived duplicity in "stealing the prize."

In view of Scott's flawed record as a leader, it is difficult to attribute his failure simply to an unexpected cold snap. But debating Scott's culpability is less important than understanding the

broader leadership lessons provided by the race to the South Pole.

Effective Leadership Requires a Clear Strategic Focus.

Amundsen's ambition was to stand first at the North Pole. When Cook and Peary claimed that prize, Amundsen immediately shifted his attention to winning the race to the South Pole. This new goal became the sole focus of his expedition. With single-minded determination, Amundsen set his plans and priorities. This uncompromising clarity contributed to his success in reaching the Pole and to his ability to bring his men safely home.

Scott, in contrast, lacked such focus. To support his scientific goals, he assembled the most capable scientists and the best-equipped expedition ever to explore Antarctica. Yet, he had also stated that one of the major objects of the expedition was to reach the South Pole, securing the honor of that achievement for the British Empire. Striving for both goals, Scott failed to win the race, and his grueling march to an arbitrary geographic point was inconsistent with the pursuit of scientific research.

Successful Leaders Are Open to New Ideas

A second lesson from the race concerns the leader's critical role in fostering innovation. The process of innovation depends on openness to new ideas, coupled with the ability to learn from experience. On this dimension of leadership, there were striking differences between Amundsen and both Scott and Shackleton.

The Norwegians owed much of their success to the use of sophisticated technology for polar travel—skis, dogs,

clothing, and diet. It is true that skiing was an integral part of their culture, while the British knew relatively little of the art. But Amundsen continued to refine his skills throughout his life. He learned from his earliest experiences on the *Belgica*, he imported ideas from the Eskimos, and he systematically developed an integrated set of competencies for polar life and travel. Consequently, his trip to the pole was remarkably routine, and he was able to avoid the extreme weather that Scott had to endure.

Scott and Shackleton, in contrast, were surprisingly resistant to the use of these superior methods. It is easy to understand their failure to use the best technology on their first journey toward the Pole in 1902—although Scott's admission that none of their equipment had been tested is still surprising. In later expeditions however, their persistent reliance on unproven or inferior methods is difficult to understand.

Scott believed that he had learned from earlier mistakes, but the evidence suggests otherwise. On later expeditions, both Shackleton and Scott experimented unsuccessfully with motor sledges and ponies, but neither made effective use of dogs and skis. Ultimately, both relied on the slow, exhausting technique of man hauling.

In the end, Scott proved Markham wrong. Though he possessed youth and inexperience, Scott often failed to display an openness to new ideas and the ability to learn from mistakes. In his final "Message to the Public," Scott attributes the cause of the tragedy simply to "misfortune." Scott's lengthy journey did subject his party to the

misfortune of particularly cold weather—conditions that Amundsen escaped through a rapid assault on the Pole.

Leaders Need to Draw on the Collective Wisdom of the Team

As a leader, Scott believed it was his unique responsibility to analyze situations and draw conclusions. His decisions were closely held and sometimes revealed at the last minute—witness his decision to take a fifth man to the Pole. One consequence of Scott's decision-making style was that he often failed to use the opinions of others to find the best possible course of action. In addition, because they were not involved in the process, members of his expedition had only a limited understanding of the rationale behind his decisions.

In sharp contrast to Scott, both Amundsen and Shackleton made a point of soliciting the ideas of their team members. As a result, their actions were better informed, and the process itself—because it gave people a sense of control—resulted in greater ownership and commitment.

The Best Leaders Forge Strong Team Bonds

The contest to be first at the Pole shows that teams under the best leaders form cohesive bonds that enable everyone to work together in the face of daunting adversity. On this point, Scott again stands apart from Shackleton and Amundsen. Scott did inspire loyalty among some key members of his team, and his doomed polar party stayed together until the very end. But Scott's detachment, his emphasis on hierarchy, and his unilateral decision-making style created barriers to team cohesion.

Neither Shackleton nor Amundsen led perfectly harmonious expeditions, but both leaders demonstrated the crucial skills needed to maintain a unified team. Although their personalities were different, the leadership practices of the ebullient Shackleton and the understated Amundsen were remarkably similar. They were both acutely sensitive to the emotions of their men and consciously intervened when morale dropped. They were skilled at managing conflict and winning over potential troublemakers. They placed greater emphasis on individual ability than on rank or social status. And they participated in the most menial camp chores, never isolating themselves from other members of the expedition. These behaviors, both practical and symbolic, reinforced the message of unity.

Reflecting on the abilities of these three leaders, Apsley Cherry-Garrard, a member of Scott's second expedition, made the following observation: "For a joint scientific and geographical piece of organisation, give me Scott... for a dash to the Pole and nothing else, Amundsen: if I am in the devil of a hole and want to get out of it, give me Shackleton every time" (Wheeler, 1999, 87).

Looking back over the history of the race, these words ring true. And yet, despite their differences, Amundsen, Scott, and Shackleton did share some important characteristics. All were able to endure extraordinary hardship through exceptional perseverance, determination and courage. Those qualities are crucial for any leader—no matter what race must be run.

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