

UNIVERSITÄT  
HEIDELBERG



**ABN AMRO CASE STUDIES**

**TARA EXPEDITIONS**

**Final Report**

Ekkehard Thümler and Annelie Beller  
Heidelberg and Berlin, February 2013

**CSI**

Centrum für soziale Investitionen und Innovationen  
Centre for Social Investment

## Contents

<b>Executive Summary</b> .....	<b>3</b>
<b>1. Facts &amp; Figures</b> .....	<b>4</b>
<b>2. Description</b> .....	<b>5</b>
2.1 Status quo and development .....	5
<b>3. Analysis</b> .....	<b>7</b>
3.1 Tara as a hybrid organisation .....	7
3.2 Strengths .....	8
3.3 Challenges .....	9
3.3.1 Social impact .....	9
3.3.2 Organisation .....	10
3.3.3 Communication .....	11
<b>4. Recommendations for Leadership</b> .....	<b>13</b>
4.1 In terms of social impact .....	13
4.2 In terms of organisational adjustments .....	13
4.3 In terms of communication .....	14
<b>Sources</b> .....	<b>15</b>

## Executive Summary

The organisation 'Tara Expeditions' is dedicated to fostering scientific research into the impact of global warming on marine ecosystems, in raising public awareness related to these issues, and in disseminating scientific data for educational purposes.

The key strengths of Tara are the high-quality scientific research it supports, on the one hand, and the opportunity to convey its message by making use of inspiring and adventurous stories, as well as visual material of expeditions on the famous boat, on the other.

In terms of social impact, Tara's challenges are threefold: (1) the kind of attitude or behaviour change Tara wants to see as a result of its work has not yet been specified in sufficient detail; (2) special attention should be directed toward organising operations in order to achieve the aspired change; (3) accordingly, Tara may profit from a more coherent style of communication.

Many of the challenges the Tara Foundation faces are due to its character as a hybrid organisation, combining the logics of two spheres: science and civil society. This implies particular strengths but can also lead to frictions and ambiguities. In this situation, there are the following strategic options for Tara leadership and staff:

1. The organisation should further specify the effects it aims to bring about and formulate a more sophisticated theory of change.
2. Tara should organise operations according to the theory of change. In particular, they should find a deliberate way to cope with the hybrid nature of the organisation, preferably with the aim to turn hybridity into a more productive asset with regard to its long-term purposes.
3. Tara should further develop its communication efforts based on a coherent overarching organisational narrative which is supposed to be shared by everyone in the organisation, particularly for communication with external stakeholders.

## 1. Facts & Figures

<b>Programme Information at a Glance</b>	
Name	Tara Expeditions
Duration	Expeditions organised since 2003; Foundation created in 2009
Budget	Annual budget: EUR 1.8m (average)
Sources of revenues	Diverse. Principal sponsor: agnès b.
Team	5-7 staff in the office 10-12 staff on the boat
Field of activity	Research, education, advocacy
Mission	“The purpose of the Tara Foundation is to finance French scientific research into the impact of global warming on ecosystems, to raise public awareness of environmental issues, and to disseminate scientific data for educational purposes.” <sup>1</sup>
Main activities	<ul style="list-style-type: none"> <li>• Provide grants and financial aid to researchers or research teams</li> <li>• Organise scientific expeditions on the schooner Tara</li> <li>• Communicate with the broader public by means of, e.g., producing films and organising exhibitions and conferences</li> <li>• Develop and employ an educational programme for young people, informed by scientific research</li> </ul>

---

<sup>1</sup> Foundation Statute

## 2. Description

### 2.1 Status quo and development

‘Tara Expeditions’ is a French endowment fund. It was initiated by the French designer agnès b and the company’s director Etienne Bourgois. Its main focus is on organising scientific research missions on the schooner Tara to learn more about the impact of climate change on marine ecosystems. At present, the scientific mission ‘Tara Oceans’ is conducting the first global study of marine plankton. The organisation is also working on educating young people, as well as raising awareness among the general public and briefing political stakeholders.

Since 2003, eight Tara expeditions have been conducted on the schooner: Greenland (2004), South Georgia/Antarctic Peninsula (2005), Patagonia (2006), Tara Arctic (2006-2008) and Tara Oceans (2009-2012). Future missions to the Great North (2013), Pacific Coral Reefs (2014-15), as well as a new Arctic Mission (2016-17), are planned.

During the ‘Tara Arctic’ expedition, the schooner drifted on the arctic ice for over 18 months. The objective was to contribute to the understanding of arctic climate change. The expedition provided one third of the results of the European scientific programme ‘Developing Arctic Modelling and Observing Capabilities for Long-term Environmental Studies’ (DAMOCLES).

‘Tara Oceans’ is the first global study on marine plankton and its importance for the climate. The project brings together twelve different research fields and an international and interdisciplinary team (oceanographers, ecologists, biologists, geneticists, and physicists). It is headed by Eric Karsenti of the European Molecular Biology Laboratory (EMBL Heidelberg). The researchers expect that it will take more than ten years to analyse all collected data in order “to provide an integrated vision of the world’s plankton ecosystem”<sup>2</sup>.

‘Tara Expeditions’ are affiliated to the United Nations Programme for the Environment.

---

<sup>2</sup> Tara Oceans (2012)

Through the educational outreach programme 'Tara Junior' the foundation aims to increase environmental awareness among young people. The programme is designed for teachers who can then integrate it into their lessons. Around 23,000 French-speaking students have participated in the programme thus far. In addition, 15,000 children from across the world have visited the boat.

In terms of public relations, six documentaries and five books have been created and nearly two million people have visited the different exhibitions. Worldwide over 70 conferences have been held and 50,000 copies of the Tara Journal have been distributed.

### 3. Analysis

#### 3.1 Tara as a hybrid organisation

According to our analysis, Tara is best characterised as a hybrid organisation. These types of organisations combine elements, value systems and action logics of various societal subsystems (such as the state, business, church or family). To be more precise, organisations may qualify as hybrid if objectives, according to different logics, are equally valued and pursued.<sup>3</sup>

In the case of Tara, civil society values (such as participation and popular control over issues of collective concern) and scientific values (mainly truth and the generation of knowledge) are combined. Other examples of hybrid organisations include public sector organisations that behave in a more business-like manner, as well as state-owned enterprises that also compete on the market place. Hybrids can also be found between the market and non-profit sector: i.e. in the form of non-profit organisations that generate income to subsidise a public purpose, or corporations that try to reconcile profit optimisation with social responsibility.<sup>4</sup> Researchers currently diagnose an increased emergence of this type of organisation caused through broader shifts in society that trigger organisational changes.<sup>5</sup>

As hybrid organisations combine essentially incongruous elements, persistent tensions can arise. These tensions can have positive and negative economic, performance-related, cultural and governance-related effects for the organisation, its principals and customers/beneficiaries. The good news is that, according to research, a successful integration leads to a higher level of organisational effectiveness – for instance in the case of organisations that successfully entertain commercial activities yielding high revenues for beneficial purposes.

---

<sup>3</sup> The Centre for Social Investment has studied hybrid organisations within the course of the research project *The Governance of Hybrid Organizations* ([https://www.csi.uni-heidelberg.de/downloads/CSI\\_profile\\_Hybrid\\_Organizations.pdf](https://www.csi.uni-heidelberg.de/downloads/CSI_profile_Hybrid_Organizations.pdf)). CSI has also hosted the international research symposium *Governance and Leadership in Hybrid Organizations* ([https://www.csi.uni-heidelberg.de/Hybridity\\_Symposium/CSI\\_profile\\_Hybridity\\_Symposium.pdf](https://www.csi.uni-heidelberg.de/Hybridity_Symposium/CSI_profile_Hybridity_Symposium.pdf))

<sup>4</sup> Anheier 2011

<sup>5</sup> Anheier 2011

According to CSI research, conflicts arising among the different spheres of hybrid organisations need to be balanced proactively. In order to be successful, significant effort has to be undertaken to establish an organisational culture that enables continuous learning and openness. In particular, such organisations need a hybrid **organisational narrative**, i.e. a consistent storyline that is based on and expresses the consistency of the hybrid organisational design. The narrative is crucial both for internal and external purposes. Internally it provides a common identity and feeds organisational cultures; externally it enhances communication with stakeholders and to the wider societal environment in which an organisation operates.<sup>6</sup>

### 3.2 Strengths

Tara works based on a close collaboration with distinguished researchers from different disciplines and countries. This evidence indicates that the scientific part of Tara delivers quality research beyond doubt and that conducting expeditions on the schooner Tara is an innovative and comparatively efficient way to conduct top-level research.<sup>7</sup>

Moreover, the high degree of enthusiasm and commitment to the organisation expressed by all interviewees is remarkable. It is not least triggered by the ‘adventurous’ aspect of using a famous boat with a thrilling history, as well as the expeditions into the great unknown oceans that also seem to evoke a strong response among public audiences. Thus the conclusion can be drawn that Tara achieves a comparatively high level of (internal) commitment and (external) visibility and outreach.

Finally, Tara’s capacity for successful high-level advocacy work needs to be highlighted. For instance, the Secretary General of the United Nations, Ban Ki-moon, and New York’s mayor, Michael Bloomberg, visited the schooner during its stay in New York. Ban Ki-moon shared his experiences on board the Tara during his talk at the Rio conference. This indicates Tara’s outstanding potential to inspire and involve relevant stakeholders.

---

<sup>6</sup> Buttle 2008

<sup>7</sup> Auf dem Kampe (2011)



### 3.3 Challenges

Challenges can be arranged along three broad themes: (1) impact, (2) organisation and (3) communication. All three are linked to each other: if the overall theory of change is not sufficiently specified, it cannot provide adequate guidance to the organisation's design, thus potentially leading to a somewhat blurred style of communication. For instance, when we explicitly asked interviewees for Tara's core goals, the answers differed notably. Compare the following claims: Tara works to:

- "Generate scientific data for educational purposes."
- "Advance knowledge of maritime biodiversity".
- "Use the boat to do good science and public outreach."
- "Raise the profile of science among the general public and shorten the gap between science and civil society."

The results of this ambiguity are vividly expressed by the following statement: "People used to say: You are not clear enough, it's not very clear what you are doing. It's not very clear what you want to achieve". The interviewee resumed that Tara staff "needs to get better in understanding what we actually do". In the following, these important points will be further elaborated and recommendations on how they can be addressed will be provided.

#### 3.3.1 Social impact

While, in principle, the ideas Tara is based on and its division of labour are easy to comprehend, it did not become entirely clear to the CSI research team what kind of social change Tara aims to achieve and by which means, particularly when it comes to the civil society side of the organisation. Of course, this is the much more difficult aspect, as the intention to advance scientific knowledge is much more straightforward for the members of Tara's research team. However, under these conditions, answers to the crucial 'so what?' question remain somewhat ambiguous. More precisely, findings point to the following points of concern:

##### ***Breadth of mission***

The foundation is dedicated to a very broad mission (see page 1) and the target group has been defined by interviewees as both "civil society worldwide" and "the general public".

The breadth of this target group is extremely challenging in terms of feasibility, sustainability and communication.

### ***Aspired change of attitude or behaviour***

It remains unclear as to how the addressees of Tara's outreach and education programs are supposed to change their attitudes or behaviour as a result of being confronted with Tara's intervention. Take the statement by one of our interviewees that Tara wants to "share our vision of a planet ocean and see that it is replicated". This might be a notion too vague to guide organisational action.

### ***Theory of change***

A better specification of objectives would be instrumental in spelling out a more sophisticated theory of change. Such a theory – in principle a simple story explaining in detail how activities lead to the aspired effects – might help specify by which means and by which processes Tara is going to achieve these aims.

## **3.3.2 Organisation**

The organisation comprises three different functional units or fields of activity: science, education and communication. While each of them seems to deliver excellent work, it is unclear how strong the ties between the different activities actually are. Moreover, different degrees of professionalisation in different units are observable. Finally, it is assumed that different fields of activity require different contents.

### ***Coherence of operations***

In the face of open questions regarding Tara's overall thrust, at first interviewees repeatedly expressed some degree of uncertainty regarding the clarity of the common purpose of the organisation and its operations. While the scientific purpose seems to be clear, interviewees diagnosed a tendency for a lack of directive due to a lack of formally-specified goals, including answers to such questions like "where are we going to?" in order to better co-ordinate and inform collective action.

At the same time, however, interviewees expressed satisfaction with the high degrees of freedom and discretion that comes along with this style of work. Moreover, the assumption can be put forward that high organisational flexibility and the need to work on an

ad-hoc basis are the necessary prerequisite for an organisation like Tara as it focuses on a boat that continually travels around the world, thus opening up limited-time opportunities for local presence. Yet we see the option to cautiously strengthen the link between the organisation and its overall objectives without turning all operations upside down. This might be a good opportunity for enhancing the future effectiveness of Tara operations.

### ***Consequences of hybridity***

Tara's hybrid nature is expressed by the fact that the two units of 'Tara Expeditions' and 'Tara Oceans' operate at eye level, preserving their own values and modes of working. At first glance, it would have been expected that either science comes first and that communication and awareness building efforts are designed as mere media instruments to deliver the research results; or otherwise that the issues of climate change/planet ocean come first and that research efforts are more directly linked to the problem and identifying possible solutions.

Interviewees reported no severe problems but rather a number of irritations that can be organised along the following lines: they remarked that there is "a multitude of rationales and a multitude of motivations that are associated with the project" and observed that sometimes different rationales generate internal conflict and trade-offs. For instance, they observed "differences in rhythm" as the communication department wants more information from researchers while scientists try to slow down the process of information exchange in order not to communicate premature messages. While by no means a severe problem for the organisation, hybridity thus becomes a constant cause of minor disturbances and frictions.

### **3.3.3 Communication**

For an organisation like Tara, the quality of its external communication is of crucial importance both for the generation of social impact and for successful fundraising. Tara entertains a highly professional and attractive web presence for different target groups in different languages, namely [www.oceans.taraexpeditions.org/](http://www.oceans.taraexpeditions.org/); [www.tarajunior.org](http://www.tarajunior.org) and [www.facebook.com/tara.expeditions](https://www.facebook.com/tara.expeditions). By organising trips to the boat and seeking comprehensive media coverage (to mention only some of the tools employed), Tara manages to be seen and

heard in the general public sphere, mostly in France, but also worldwide, depending on the countries the boat visits.

### ***Communication strategy***

Within the course of analysis, no explicit strategy for general communication or for fundraising purposes could be identified. While Tara activities in this field look highly professional and while, in important respects, they are without a serious alternative, it can be deduced that an increase in sophisticated reflection on communication as a means to realise the organisational goals might be worthwhile. In particular, from the evidence gathered, it seems that Tara would profit from a systematic reflection on possible answers to the question of how the global general public can be reached by means based on the limited resources available to Tara.

### ***Coherence of communication***

At first glance, the different purposes of Tara do not necessarily seem to be mutually reinforcing. According to its mission, Tara aims at raising public awareness of environmental issues, and to disseminate scientific data for educational purposes. However, it remains unclear why the generation of state-of-the-art scientific knowledge about maritime ecosystems is needed in order to reach the wider public and to teach school children. Would it not be more prudent to concentrate scarce resources on communication and diffuse the scientific knowledge that is already available?

Seen the other way around, Tara wants to support scientific research on the impact of global warming on ecosystems. Assuming that scientific operations are usually self-sufficient, would it not be better to invest in as much research as possible, assigning a more humble role for communication?

Major potential can thus be seen in the process of spelling out why the unique combination of both approaches does not lead to organisational incoherence, but can be regarded as Tara's core strength and most important societal contribution instead.

## 4. Recommendations for Leadership

In important respects, Tara is an innovative, well-performing and particularly well-connected charity. Hence we recommend cautiously fine-tune strategy and operations in order to sharpen focus, enhance organisational coherence and to communicate more effectively.

### 4.1 In terms of social impact

Regarding social impact, as a first step Tara should further specify the social change it wants to see as a result of its activities. If possible, the complexity of the endeavour should be reduced – for the time being the target group is overly large, meaning that no clear-cut targets can be provided. Options include a reduction in geographical terms (e.g. focussing exclusively on France), reduction in terms of the target group’s composition (e.g. focussing only on a certain age group) or a similar aspect. This would enable the formulation of a more precise theory of change that specifies the processes which are supposed to generate the desired effects, on the one hand, and the means and resources needed to realise this process, on the other.

### 4.2 In terms of organisational adjustments

The above mentioned strategic adjustments will help streamline operations according to the revised theory of change. These options entail the particular need to find a deliberate way to cope with the hybrid nature of the organisation, preferably with the aim to make hybridity more productive for Tara’s long-term purposes. We see three distinct options to steer the further course of events:

- **Option 1: Tara could keep dealing with its hybrid nature the way it does today.** This implies the opportunity to make use of a wider spectrum of activities and a considerable degree of freedom for Tara staff. However, it also entails the need to consciously accept the unavoidable ambiguities and tensions that go along with it.
- **Option 2: Tara could aim at reducing hybridity by means of privileging one aspect of operations as opposed to the other.** This might result in a stricter focus on communicating exclusively scientific results, thus becoming a more explicit provider of communication services for science. Otherwise the decision could be made to either re-

duce the research aspects or else support a type of research that is more application-oriented or better suitable for communication and education purposes.

- **Option 3: Tara could aim for a better integration of both parts of the organisation.** The idea would be to spell out more explicitly why hybridity is a virtue and Tara's major asset, rather than a source of incoherence. This approach would require the formulation of a hybrid narrative as discussed above (see the paragraph on the consequences of hybridity in 3.1). It might be formulated along the following questions:
  - Does it present Tara as a well-integrated and coherent enterprise to internal and external audiences?
  - Does it specify what Tara aims to achieve and by which means?
  - Does this message invite others to get involved and take action?

#### **4.3 In terms of communication**

Moreover, we suggest that Tara invests in the further development of its communication activities. As we are not specialists on these issues, we cannot spell out options in more detail here. However, we see particularly high potential for Tara if the organisation:

- makes use of high-quality pro-bono communication consultancy service with the aim of refining its communication strategy, and
- draws in additional knowledge on options to influence the perceptions and behaviour of its target group, e.g. by considering media impact research, or else by partnering with organisations working with similar aspirations but employing different methods.

## Sources

### Literature

- Auf dem Kampe, Jörn (2011): Das Plankton-Projekt. In: Geo 12/2011
- Buttle, Martin (2008): Diverse economies and the negotiations and practices of ethical finance: The case of Charity Bank. In: Environment and Planning 40(9): 2097-2113.
- Glänzel, Gunnar; Schmitz, Björn (2012): Case Study Charity Bank

### Foundation Documents

- Foundation Statute (2008)
- Tara Oceans (2012): A Scientific Expedition. A Commitment for the Planet.

### Online Resources

- Anheier, Helmut K. (2011): Governance and Leadership in Hybrid Organizations. Comparative and Interdisciplinary Perspectives. Background Paper: [https://www.csi.uni-heidelberg.de/Hybridity\\_Symposium/Hybridity%20Symposium\\_Background%20Paper.pdf](https://www.csi.uni-heidelberg.de/Hybridity_Symposium/Hybridity%20Symposium_Background%20Paper.pdf)
- Web page: <http://oceans.taraexpeditions.org/>

### Interviews

- Telephone Interview with Romain Troublé, September 21, 2012
- Interview with Romain Troublé, November 9, 2012
- Interview with Halldór Stefansson, November 28, 2012
- Telephone Interview with Johanna Sanson, January 9, 2013
- Telephone Interview with Xavier Bougeard, January 10, 2013
- Interview with Eric Karsenti, January 17, 2013

## Contact Details

Centre for Social Investment (CSI)  
Heidelberg University  
Adenauerplatz 1  
69115 Heidelberg  
Germany

Ekkehard Thümler  
Mail: [ekkehard.thuemler@csi.uni-heidelberg.de](mailto:ekkehard.thuemler@csi.uni-heidelberg.de)  
Phone: +49 6221 54 119 64

Annelie Beller  
Mail: [annelie.beller@csi.uni-heidelberg.de](mailto:annelie.beller@csi.uni-heidelberg.de)  
Phone: +49 30 234 587 55