

Chapter II

Connecting Courts and Cloisters: Memoria, Sovereign Patronage and Annuity Endowments in the Byzantine World*

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Introduction

The material basis of foundations in the medieval world was, in general, land; though many forms of capital could be endowed, “real estate formed the most important basis for the realization of a foundation’s purpose” [Borgolte 2016, 285].¹ The ownership of landed property represented the securest means of securing the material prosperity of foundations. There were of course exceptions, such as the endowment of large sums of money in Greco-Roman antiquity, the cash *waqf* of Ottoman society and money foundations of the European Late Middle Ages. Yet whether land, money or some other form of property, such as luxury objects, all of these forms of capital were endowed to and then belonged to a foundation.

This paper will offer an analysis of a type of foundation known from the Byzantine and wider Orthodox world which does not quite fit with the traditional notion of foundations. In essence, there is significant evidence from the Byzantine context for what might be termed an annuity endowment or foundation. An annuity endowment was a specific subtype of foundation, in which the founder endowed his foundation with the promise of a specific sum of money or goods, to be rendered annually. Instead of land, the grantees of an annuity endowment received a claim on a sum in money or in kind to be paid by the founder or his descendants. An arrangement of this sort created a foundation significantly different from that of the tradi-

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¹ For a definition of foundations, see Borgolte [2019, 2]; Chitwood et al. [2017, 8].

tional endowment with land.

By contrast, an annuity endowment did not necessarily require the setting up of a financial administration. Instead, the means by which the annual sum, the endowed annuity, was produced remained entirely at the discretion of the founder. A monastery which was granted an annuity endowment merely had to organize the transfer of the sum to the monastery's coffers. As we shall see, there were a number of ways of collecting the annual sum, whether from the tax receipts gathered by the local administration, by travelling directly to the location of the founder or even by specifying that another economic unit, such as another monastery, produce the required sum. At a basic level, it spared the foundation from embarking on the laborious, time-consuming and—especially relevant in the monastic context—spiritually hazardous process of economic oversight.

Since most of the surviving evidence for such annuity endowments comes from sovereigns—Byzantine emperors, Serbian princes and Danubian voivodes, among others—this contribution will mainly discuss sovereign annuity endowments. In addition, in what follows an overview of the origins of such annuity endowments will be offered before moving onto specific cases over the course of the Middle Ages. Many examples come in particular from Mount Athos, which I discuss in greater detail in a separate, forthcoming study [Chitwood, forthcoming]. By contrast, in this contribution I have a somewhat wider, more general focus.

1. The Origins of Sovereign Annuity Endowments in Late Antiquity (ca. 300–500)

The phenomenon of annuity endowments in Byzantium has to date received scant attention [Chitwood 2016, 330–331], and it was only in 2018 that a first article-length examination of the phenomenon was authored by Dirk Krausmüller, who focused on monastic communities without landed endowments in the eleventh and twelfth centuries [Krausmüller 2018]. Though Krausmüller postulated that annuity endowments were an innovation of monastic reformers around the year 1100, such foundations in fact were part of a much older tradition, one that harboured deep misgivings about the acceptability of monks becoming involved in property dealings of any sort.

In fact, there is little evidence for churches or monasteries being major landholders in the Eastern Roman Empire during Late Antiquity (ca. 300–800). This impression is confirmed in imperial legislation, surviving legal records (which are exceptionally rich in Egypt, due to the papyri) and happenstance mentions in other sources, such as saints' lives. Even in Egypt, where the source material is most extensive, clear evidence for monastic property appears relatively late, namely beginning in the period from the sixth to the eighth century [Wipszycka 2011, 171–

172]. Monastic landholding is even less well-attested in Syria, and, as in Egypt, first appears relatively late, from the second half of the seventh century onward.² The relative unimportance of monasteries as major landholders is also reflected in the legislation of the Emperor Justinian (r. 527–565), in which the property relations of churches and charitable establishments are more frequently mentioned than that of monasteries [Kaplan 2021, 344].

As an alternative to landholding, in Late Antiquity it was quite common for individuals to finance their foundations through so-called *presbeia annalia*, yearly payments to churches, monasteries or philanthropic establishments [Thomas 1987, 49]. As with landholding, the evidence for such annuities has a regional tinge, but there is substantial evidence for the practice in Egypt and Palestine, less so for Syria.³ As with the phenomenon of founding churches and monasteries more generally, endowing such institutions with annuity endowments was mostly restricted to the elite, and eventually becomes discernable in the imperial household itself. The hagiographical works of Cyril of Skythopolis (mid-sixth century) yield several examples of emperors or members of the imperial family choosing to grant religious communities annuity endowments, as in the case of the widowed empress Eudokia [Cyril of Skythopolis 1939, 53, line 28 to 54, line 7].

Justinian also seems to have also mainly employed such annuity endowments as a patron. To give just one example, in Cyril of Skythopolis' *Life of Sabas*, when Sabas went to the court of Justinian to request aid in rebuilding Palestine after the Samaritan revolt, Sabas was asked by the emperor if he needed a state subsidy for the monasteries under his care, which Sabas refused, instead asking for five specific favours. One of these favours was the request to construct a hospital in Jerusalem, which Justinian initially endowed with an income in its first year of 1,850 *solidi*, before doubling this sum in subsequent years along with its capacity from 100 to 200 beds [Cyril of Skythopolis 1939, 72–73].⁴

Nor were Jerusalem and the Holy Land, which, as we shall see, constituted one of the foremost destinations for sovereign annuity endowments, the only object of imperial beneficence via endowments. The Orphanotropheion of Constantinople, the grand orphanage which was the largest charitable house in the Byzantine

² On the Syrian material, see now Wipszycka [2020].

³ Egypt: Wegner 2021, 27–28; Klein 2018, 41–44; Syria: “It is important to note that mentions about establishing systematic subsidies in kind or in money for monasteries are extremely rare, although we know these took place in Egypt, where they constituted a considerable source of income” [Wipszycka 2020, 235].

⁴ As noted by Daniel Caner, this passage can be construed as evidence of the tension between within the monastic communities of the Eastern Roman Empire, who were divided between a more traditional party which advocated that monks should live off of alms, and a more economically-minded group willing to accept monastic landholding [Caner 2021, 222–223].

Empire and in the medieval world more generally, was supposedly endowed with an annuity of 443 gold coins under Justin II (r. 565–578).⁵ This income was not the only source of support for the Orphanotropheion's endowment, since it also possessed rented state lands.

We find a unique attestation for sovereign annuity endowments from a problematic Armenian source supposedly composed shortly before or after the year 600. This text is a list of Armenian monasteries in Jerusalem ascribed to Anastas Vardapet, most of which were royal or princely foundations [Anastas Vardapet 1969].⁶ The author briefly mentions how these foundations were financed, noting that the incomes from villages in Armenia that had been endowed by kings and princes had no longer been dispatched to the Holy Land, due to ravages in Armenia itself [Anastas Vardapet 1969, 275 (Armenian text), 279 (English translation)].

Earmarking the income from an estate or village for the financing of a monastery, rather than endowing it directly with land, corresponded to Byzantine practice in Late Antiquity. What was new, however, is that this type of financing was used to support foundations outside the sovereign's realm, as a sort of long-distance endowment. Particularly for monasteries in the Holy Land, which, excepting a brief period during the Crusades, were under Muslim rule, sovereign annuity endowments seem to have been an attractive practice during the Middle Ages for the Orthodox Christian rulers of the Eastern Mediterranean.

2. Endowing at a Distance: Byzantine Imperial Annuity Endowments, ca. 800–1200

We possess practically no evidence for the practice of annuity endowments from the end of the reign of Justinian until the tenth century. Nonetheless, in these centuries the character of annuity endowments, especially at the imperial level, seems to have fundamentally changed. Imperial annuity endowments in Late Antiquity were often employed to support state-run philanthropic establishments, such as the Orphanotropheion or Justinian's *Nea Ekklesia* in Jerusalem. When evidence for Byzantine

⁵ The authenticity of this law of Justin II is not universally accepted, as we possess no contemporaneous source for this legislation, the sole reference being one of the texts attached to the corpus of Leo VI's (r. 886–912) *Novels* [Novels of Leo VI 1944, 377–378]. On the question of its authenticity see Dölger and Müller [2003, nos. 48–49]. Legendary material relating the founding of the Orphanotropheion sometimes ascribes Justin II a key role, as attested by the *Patria* and one version of the *vita* of St. Zotikos [Miller 2003, 52–55].

⁶ Sanjjan in his edition makes a minimalist case for the text's authenticity, though later Nina Garsoïan argued that the text seems to accurately reflect a late sixth- or early seventh-century context: see Garsoïan [2002; 2005–2007, 220–226].

tine annuity endowments reappears in the tenth century, however, we find that they were overwhelmingly employed to support monastic communities, of various types and sizes.

Under Romanos I Lekapenos (r. 920–944) a new policy was implemented, whereby the treasury paid one gold coin (*nomisma*) annually to the monks residing “in the mountains” (*en oresi*), namely on Bithynian Olympos, Kyminas, Athos, Barachaios, Latros and Chryse Petra [Dölger and Müller 2009, no. 648e]. At least in most of the cases of these mountains—too little is known about Barachaios or Chryse Petra—their alpine monastic communities were instrumental in a process of sacralization of the peaks they lived on or around, which were often of great natural beauty: these were “Holy Mountains.”⁷

It is difficult to contextualize the purchasing power of this stipend and whether it would have sufficed to support a monk. An income of only one *nomisma* a year would likely not have maintained a monk living in a regular, urban cenobitic monastery—Michael Attaleiates in his *typikon* of 1077 envisioned 6–7 *nomismata* for a monk at his Constantinopolitan monastery, along with a food allowance of 30 *modioi* [Morrisson and Cheynet 2002, 868 (Table 19: Income of Ecclesiastics)]. The gold currency of the eleventh century had, however, depreciated considerably in comparison with its tenth-century counterpart: a contemporaneous comparison would have been the salary for a soldier or a sailor around the middle of the tenth century, who earned 3 *nomismata* annually [Morrisson and Cheynet 2002, 859–861, esp. 861, Table 16: Wages of Officials]. Given that many of the monks in these regions were hermits who could to a large extent live off the land by foraging,⁸ a sum of this sort may well have sufficed to support a solitary ascetic, especially when supplemented by his own handiwork.

Our best evidence for imperial annuities on these Holy Mountains comes from Mount Athos, where they played an important role in financing the larger, communal monasteries of Lavra, Iviron and Vatopedi. In the year 964, the first year that an individual monastery on Athos was granted an annuity endowment, the Great Lavra, which at that point comprised 80 monks, was promised 288 gold coins annually [Dölger and Müller 2009, no. 699a (704)], while the entire Hagiorite community was granted an annual payment of 7 pounds of gold (504 gold coins) [Dölger and Müller 2009, no. 705]. Lavra’s annuity was substantially increased to the huge sum of 488 gold coins a year during the reign of John I Tzimiskes (r. 969–976).

It took some decades before other monastic endowments on the Holy Moun-

⁷ On Holy Mountains in Byzantium, see Talbot [2001]; Beyer and Sturm-Schnabel [1981].

⁸ On the diet of Byzantine hermits, and in particular their ability to live off the land by foraging, see Talbot [2019, 116–121].

tains were granted imperial annuity endowments. Although the annuity endowments of the other two monasteries on Mount Athos in this period paled in comparison with those of Lavra, the sums they were granted were still impressive: during the reign of Constantine IX Monomachos (r. 1042–1055) Iviron received 72 gold coins a year, while Vatopedi was granted 80.⁹ The peak of Athonite sovereign annuities was reached shortly afterward, during the reign of Michael VI (r. 1056–1057). It was during this period that the annuity endowment for the Holy Mountains as a whole was raised to 10 pounds of gold (720 gold coins), while Lavra itself received an additional 11 pounds of gold and 20 gold coins (812 gold coins) [Dölger and Wirth 1995, no. 932] and the annuity of 80 gold coins annually for Vatopedi was confirmed [Dölger and Wirth 1995, no. 937b]. The share of the imperial annuity is occasionally mentioned in Athonite legal documents from this period, as in the grant of a small hermitage at Selina on Mount Athos on 23 December 1037 [Acts of Esphigmenou 1973, 43–46 (no. 2)].

Constantine's reign represented the high point of imperial annuities—perhaps such generous financing of the Holy Mountains had become unsustainable, especially given the deteriorating political situation and the empire's increasingly strained fiscal means from the middle of the eleventh century onward. The first Komnenian emperor, Isaac I (r. 1057–1059), reduced the imperial annuity to Vatopedi by half, to 40 gold coins [Dölger and Wirth 1995, no. 944b]. It seems that the fisc found it increasingly difficult to pay sums promised by previous emperors, so that towards the end of the eleventh century some Athonite monasteries agreed to accept reduced annuity endowments. Thus, in July of 1079 Iviron agreed to receive a reduced annuity of 4 pounds of gold and 16 gold coins, as opposed to the 8 pounds of gold and 16 gold coins that had earlier been rendered [Dölger and Wirth 1995, no. 1044a (1040)]. In a similar fashion, Vatopedi accepted an arrangement whereby its onetime annuity of 72 gold coins was given up in return for 19 gold coins in tax remissions [Dölger and Wirth 1995, no. 1077a].

Instead, imperial favour with annuity endowments was directed elsewhere. One beneficiary was the new monastic establishment of Nea Mone on Chios, which was granted 72 gold coins in February of 1045 [Dölger and Wirth 1995, no. 865]. This annuity was eventually doubled to 2 pounds of gold (144 gold coins) [Dölger and Wirth 1995, no. 1043b (1031)]. Nea Mone was also gifted with an annuity in kind, in the form of 1,000 bushels of grain a year, which were to be rendered by an imperial domain [Dölger and Wirth 1995, nos. 913–914, 949]. This intense imperial patronage took place within a half-century, which was punctuated by a scandal involving some of the founding figures of the monastery in the middle of the eleventh century.

⁹ Iviron: Dölger and Wirth 1995, nos. 885b, 928c; Vatopedi: Dölger and Wirth 1995, no. 928g.

Annuity endowments could also be used within the remit of diplomacy, as evidenced by the famed Benedictine monastery of Monte Cassino, which enjoyed especially close relations with the imperial house in the eleventh century [Falkenhäusen 1992; Loud 1994]. A mark of this favour is the annuity which was granted to the monastery in April of 1076, by which Monte Cassino was to receive 24 pounds of gold annually, as well as 4 silk garments [Dölger and Wirth 1995, no. 1006].¹⁰

Annuity endowments were employed with a new pattern of patronage under the Komnenian dynasty (1081–1185). Whatever the personal proclivities of the Komnenian emperors, it seems that Mount Athos clearly fell out of imperial favour during their rule. Instead, Constantinople became the showplace for a flurry of monastic and philanthropic foundations, not only by the reigning dynasts, but by other members of the extended Komnenian clan.

Annuity endowments were not a feature of Komnenian patronage within the imperial capital. Further afield, however, they continued to be employed, though to a lesser degree than had been the case a century earlier. Thus, Saint Meletios managed to secure an imperial chrysobull granting his new monastery on Mount Myoupolis in Attica an annuity of 422 gold coins shortly after 1084 [Dölger and Wirth 1995, no. 1121]. Exceptionally, the *vita* of the saint also details the source of the annuity: this sum was to be paid from the tax receipts of the province. The financing of Meletios' community with an annuity endowment was no chance occurrence, as it fit with saint's skepticism of monks owning landed property.¹¹

The greatest beneficiary of Komnenian annuity endowments, however, was the Monastery of Saint John the Theologian on Patmos. It was founded by the monk Christodoulos, who had fled the incursions of Turkish bands in western Asia Minor and sought to found a new monastic community on a deserted island; eventually, the (supposedly at the time completely uninhabited) island of Patmos was chosen for this purpose. Sometime after 1093, the monastery was granted an annuity of 300 bushels of wheat and 28 gold coins by Alexios I Komnenos (r. 1081–1118), to be paid by the governor (*doux*) of Crete [Dölger and Wirth 1995, no. 1170].

¹⁰ The sum of money promised to Monte Cassino—which exceeds the combined amount of all other known annuity endowments for that time—seems an impossibly large figure, even though it is not questioned in Dölger's *Regesten*. Either the number was somehow incorrectly transmitted, or 24 gold coins, rather than 24 pounds of gold, were meant. The latter possibility seems more likely, given that it would have been a standard sum for such a fiscal grant (1/3 of a pound), and was in fact the amount given in annuity endowment of the twelfth century (see the discussion of Patmos below). In June of 1112 the emperor thanked Cardinal Oderisio de' Marsi, the abbot of Monte Cassino, and granted the monastery 8 *pal-lia* and 25 pounds of gold from the monastery [Dölger and Wirth 1995, no. 1006].

¹¹ Theodore Prodromos and Nicholas of Methone report that the saint, who lived in central Greece, attest that the community he founded possessed no land, even 36 years after his death, as noted by Krausmüller [2018, 51–52].

This annuity was renewed and expanded by each of Alexios' successors, whose three reigns together spanned an entire century. Shortly after his accession, in July of 1119, John II Komnenos (r. 1118–1143) issued a chrysobull for the monastery which confirmed the annuity of his father [Dölger and Wirth 1995, no. 1296]. It is worth looking at this imperial grant in greater detail, because it is one of the few sources we have from this period in which the text of the grant survives. The chrysobull also includes a description of the grant made by John's father and predecessor, Alexios.

The monastery had already been granted various properties and privileges by Alexios, but after the death of the founding abbot, Christodoulos, as well as that of his successor Joseph Iasites, "their [the former abbots'] disciples and monks, being constrained by a want of essentials and necessities for them to live, hurried to our thrice-blessed lord and father of my Majesty, with a lofty request, and they sought something be ordained for their sustenance, and they received a *sigillion* chrysobull of his divine power, ordering that they were to be given yearly, as long as the earth exists, 300 *modioi* [bushels] of grain, and 24 Komnenian 'Theotokia' *nomismata* [gold coins] from the *doukes* [governors] of Krete at that time."¹² From the perspective of the research on endowments, it is interesting to note that—at least in this particular document—the grant of the annuity was, theoretically at least, eternal, thereby fulfilling one of the key prerequisites for the definition of an endowment: permanence.

As is almost always the case with annuity endowments, the chrysobull does not explain why this form of financing the monastery was chosen. This decision is especially conspicuous in the case of the Monastery of Saint John the Theologian on Patmos, since the phase of its establishment and early expansion did not feature annuity endowments, only being employed after the death of the first two abbots. This development differs from the Athonite model, in which annuity endowments had played an important part both in the financing of the incipient monastic communities—in the form of the one gold coin per monk annually discussed above—as well as in the rise of its large cenobitic monasteries of Iviron, Lavra and Vatopedi.

The Monastery of John the Theologian had its annuity endowment confirmed and increased by a third Komnenian ruler in succession, namely Manuel I (r. 1143–1180). Though the corresponding document has not survived, he confirmed the

¹² Imperial Acts of Patmos 1980, 78–88 (no. 8), esp. 82, lines 15–18: οἱ τούτ(ων) μαθηται καὶ μονάζοντ(ες), ἐνδεία τῶν χρειωδ(ῶν) καὶ πρὸς(ς) τὸ ζῆν ἀναγκαίων αὐτ(οῖς) συνεχόμε(εν) οἱ, τῷ τρισμακαρ[ίστῳ] αὐθ(έν)τ(η) καὶ π(ατ)ρί τ(ῆς) βα(σιλείας) μ(ου) μετὰ λιπαρᾶς δεῖσε(ως) προσ(σ)δεδραμῆκασι, τυπωθῆναι τε τούτ(οις) τὰ πρὸς(ς) διατροφ(ήν) ἐζητήσαντο, καὶ χρυσόβουλλ(ον) σιγίλλ(ιον) ἀπειλήφασι τοῦ θεοσεβοῦς κράτ(ους) ἐκείνου, τυποῦν ἐτησί(ως) δίδοσθ(αι) τρύτ(οις), μέχρις ἂν τότε τὸ περίγειον συνεστήκοι, σίτ(ου) μὲν μοδίους τριακοσί(ους), (νομίσματα) δὲ εἰκοσιτέσσαρ(α) κομνηνάτ(α) θε(εστο)κί(α) π(αρά) τῶν κατὰ καιρ(οῦς) δουκ(ῶν) Κρήτ(ης).

annuity endowment around the year 1145 and increased the amount of grain the monastery was to receive to 700 bushels and doubled the amount of money to 48 gold coins annually [Dölger and Wirth 1995, no. 1339].¹³ A clear pattern is discernable with these confirmations of the annuity endowment for Patmos: this was an act quite early in a new ruler's reign, during which the monks approached the sovereign and sought the emperor's approval to continue the pious benefactions promised by his predecessors.

One of the dangers of annuity endowments is also illustrated by the second document confirming the grant issued during Manuel's reign, in April of 1176 [Dölger and Wirth 1995, 1521a (1439); Imperial Acts of Patmos 1980, 217–224 (no. 22)]. By that time, the monastery had not received the annual payment in grain for four years, and the one in money for three. Instead of the annuity in grain and money, the monastery was to receive 2 pounds of gold, with which they could purchase whatever they required on Crete, as well as the traditional sum of 48 gold coins.

The financing of the Monastery of Saint John the Theologian on Patmos by the Komnenian dynasty, undertaken over a period of almost a century and confirmed by Alexios I, John II and Manuel I, is the first known instance of a dynastic annuity endowment in the Byzantine world. While individual emperors had confirmed the annuity endowments of their predecessors, the Komnenoi construed these financial communities not merely as imperial, but as familial obligations: an understanding of annuity endowments, interestingly enough, which was already current in Late Antiquity, when the descendants of founders were expected to pay the salaries of clergy in churches built by their predecessors.¹⁴ The connection between annuity endowments and dynastic foundations, here first observable with the Komnenoi, became more prevalent in the Late Middle Ages.

Before leaving the Komnenian Age, it is worth discussing the role of annuity endowments in the reform of monasticism in the imperial capital. The Petra Monastery, refounded by Saint John the Faster with the aid of Alexios I and Anna Dalassene, not only became one of the capital's foremost monasteries, but also was famed for its lack of landed property [Krausmüller 2018, 49–50]. Anthony of Novgorod, who visited the monastery around the year 1200, noted that if the monastic establishment possessed no land, even though it housed a community of some 200 nuns: “Und Äcker halten sie nicht, sondern warden durch die Gnade Gottes und das Fasten und durch die Fürbitten des [heiligen] Johannes ernährt” [Anthony of Novgorod 2019, 310 (Slavonic text), 311 (German translation); here citing the German translation].¹⁵

¹³ It erroneously states that the grant of grain was increased by 2 bushels (instead of 200).

¹⁴ Discussed in Thomas [1987, 49].

¹⁵ That Anthony of Novgorod speaks of nuns, while most of our references to the community refer to monks, cannot be easily reconciled: Élisabeth Malamut has sensibly concluded

A suburban monastic establishment, that of Kataskepe, was another imperial foundation financed by Manuel I, about which only very little is known. It also possessed no land and was financed solely via an annuity endowment. On the basis of the historian Niketas Choniates' description of its establishment, scholars have tended to interpret Manuel's patronage of Kataskepe as part of his efforts to reform Byzantine monasticism, and also perhaps as a reaction to Pantokrator Monastery, the lavish foundation of his parents, which had been richly endowed with landed property [Angold 1995, 355; Krausmüller 2018, 54–55; Magdalino 1993, 119].

3. Annuity Endowments and Dynastic Competition, ca. 1200–1500

Following the Fourth Crusade and the sack of Constantinople in 1204, a significant political reorientation took place in the Eastern Mediterranean: three rump-states at Epiros, Nicaea and Trebizond, rising Balkan polities like Bulgaria and Serbia and kingdoms further afield in Eastern Europe and the Caucasus competed with one another to claim the imperial legacy. One aspect of this competition was patronizing monasteries at the most prestigious holy sites within Orthodoxy, namely in the Holy Land and on Mount Athos.¹⁶ Though how this patronage activity was financed is not always explicitly mentioned in the source material, there are a number of instances where this is the case and, moreover, annuity endowments were employed. The use of such annuity endowments is known in particular for the rulers of Trebizond, Serbia and the Danubian realms of Moldavia and Wallachia.

The sovereigns of the Black Sea kingdom of Trebizond were the Grand Komnenoi (1204–1461), whose Pontic realm was the most geographically distant from Constantinople of the three Byzantine successor states. Partially due to the kingdom's geographic isolation, its chances at reestablishing the Byzantine Empire by recapturing Constantinople were never as good as those of Epiros and Nicaea. Nonetheless, the wealth of this Pontic realm was prodigious, and it enjoyed increasing prosperity in the mid-fourteenth century thanks to trade from the northern caravan routes, demand for slaves from the Black Sea region and mining.¹⁷

In addition to supporting local Pontic monasteries, the Grand Komnenoi starting in the 1340s became involved in the patronage of monasteries outside of their Black Sea realm, beginning with Jerusalem.¹⁸ Their transregional monastic patronage, however, acquired a new dimension with the founding of Dionysiou

that we must either assume that there was a double monastery, or that the community changed its composition over the course of time [Malamut 2001, 225, n. 30].

¹⁶ For patronage on Mount Athos in this period, see especially Oikonomides [1996].

¹⁷ On the economy of Trebizond, see Karpov [2017, 134–178].

¹⁸ Under Empress Anne (r. 1341–1342) the Monastery of Euthymios in Jerusalem was re-founded [Karpov 2017, 240].

Monastery on Mount Athos [Karpov 2017, 241–242]. The source material for the monastery’s founding is unusually rich, with both imperial grants from Dionysiou’s archives as well as from a *vita* of its founding abbot, Dionysios, surviving.¹⁹ In this case, an annuity endowment was the principal means by which the dynasty financed its new foundation.

As with the Komnenian dynasty’s patronage of the Monastery of Saint John the Theologian on Patmos, three emperors of Trebizond affirmed the payment of an annuity endowment to Dionysiou. Alexios III Komnenos (r. 1349–1390) announced his support for the new monastery in 1374, issuing a chrysobull that is still preserved in the monastery’s archives, by granting the establishment the sum of 100 measures (*somia*) of gold, probably equivalent to around 1,000–1,500 gold coins (*hyperpyra*)—as well as an annuity of 100 silver coins [Acts of Dionysiou 1968, 50–61 (no. 4)].²⁰ A little over forty years later, it was confirmed in 1416 in a privilege of Emperor Alexios IV (r. 1417–1429) [Acts of Dionysiou 1968, 97–101 (no. 16); Edicts of the Grand Komnenoi 2020, 348–352 (no. 5)]. The annuity was confirmed a third and final time by Emperor John IV (r. 1429–1459/60) [Acts of Dionysiou 1968, 155–157 (no. 27); Edicts of the Grand Komnenoi 2020, 352–355 (no. 6)]. Trebizond was conquered by the Ottoman Turks in 1461, thereby ending Dionysiou’s annuity endowment.

As with the Komnenoi and Patmos, the annuity endowment seems to have been renewed at the start of each new reign of a Grand Komnenos. Although the initial chrysobull of 1374 gives no precise information on how the annuity endowment was to be paid, the confirmation of Alexios IV specifies that a monastery in Pontos, the Christ Chaldos Monastery, was to render this sum, for which purpose Dionysiou was to station a representative in Trebizond.

While Byzantine emperors of earlier centuries had created annuity endowments without specifying what was to be rendered in return—at least such stipulations were not written out in the corresponding grants—in the Late Middle Ages this was often not the case. Beginning with their initial endowment of Dionysiou in 1374, three conditions were laid out: First, the monks of the monastery were obliged to commemorate the dynasty of the Grand Komnenoi. Second, the monastery was to be renamed the “Monastery of the Great Komnenos.” Third, the monks were obliged to hospitably receive and accommodate pilgrims from Trebizond and, moreover, if someone from Pontos wanted to enter the monastery he would be allowed to do so, provided the person was otherwise suitable for monastic life.

Serbian rulers in this epoch also employed annuity endowments within their patronage strategies. Like the Grand Komnenoi, the Nemanjić dynasty (1166–1371)

¹⁹ For the textual history of the *vita* of Dionysios, see Rigo [2000].

²⁰ See now the newer edition with German translation in Edicts of the Grand Komnenoi [2020, 339–347 (no. 4)].

was active in supporting monastic communities in the Holy Land. Its presence there went all the way back to Saint Sava (1175–1236), the founder of the Serbian Church as well as Hilandar Monastery on Mount Athos, who undertook two pilgrimages to Jerusalem [Popovic 2001, 389–390]. Though Sava’s benefactions there did not involve annuity endowments, he created a precedent for members of the Serbian royal house to act as patrons in the Holy Land.

Sometime around 1300, a Serbian monastery in Jerusalem dedicated to the Archangels was founded. Around 1350, Stefan Uroš IV Dušan (r. 1331–1355) dedicated the tribute of 1,000 gold coins which the Italian city of Ragusa paid for control of the city of Ston (today located in Croatia) to the Monastery of the Archangels [Slavonic Acts of Hilandar 1915, 521–523 (no. 49)].²¹ In the fourteenth century this annuity endowment was redirected to the monasteries of Hilandar and Saint Paul on Mount Athos. Among annuity endowments, the “revenue from Ston” (*stonski dohodak*) had an incredibly long life, since Saint Paul continued to receive the annuity into the seventeenth century. Though the documentary evidence for this income is problematic—it includes forgeries—the actual existence of this annuity endowment is not in question, and in both duration and character (changing recipients), it is a remarkable incidence of sovereign patronage.

As with the Grand Komnenoi, the increasing wealth of Serbia found an outlet in the use of annuity endowments to benefit foundations sometimes far outside the borders of the realms in which their patrons lived. The prosperity created by silver mining is discernable in the patronage activity of the Serbian Grand Čelnik Radič (1377–1454), a figure who straddled a declining Serbian Despotate and the encroaching Ottoman Turks [Zachariadou 2007]. Acting as the refounder of Kastamonitou Monastery on Mount Athos in the second quarter of the fifteenth century, the Grand Čelnik made liberal use of annuity endowments in his patronage activity. In 1430–1431 Radič granted the monastery an annual subsidy of 20 pounds of silver, to be paid out for the duration of his life. Following his earthly demise, the annuity endowment would be collected from seven villages which Radič owned, and the monastery would also acquire half his shares in the silver mines of Rudnik and Kamenica [Medieval Slavic Acts 2018, 104–106 (Kastamonitou. Serbian act no. 3)]. A later document confirming Radič’s role as the monastery’s new founder from 1433 shows that in the meantime Radič had donated villages to the monastery, but still continued to give 20 pounds of silver a year to Kastamonitou, on the Feast Day of Saint George. Moreover, he had also created an additional annuity endowment, consisting of 2 pounds of silver, in support of the monastery’s hospital. Radič insisted that he would have to stop paying the 20 pounds of silver annually if he

²¹ This charter of Dušan is, however, now recognized as a forgery, even though it refers to a real annuity endowment: see the discussion with reference to further literature in Medieval Slavic Acts [2018, 194–195].

were to become a monk at Kastamonitou; nevertheless, regardless of his monastic status the 2 pounds of silver would still be paid for the hospital [Medieval Slavic Acts 2018, 106–111 (Kastamonitou. Serbian act no. 4)]. In fact, Radič did eventually become a monk there, adopting the name of Roman and ending his days at the monastery.

Radič's annuity endowment for Kastamonitou was different from those of the Grand Komnenoi and Komnenoi, in that he used this form of patronage as a stop-gap measure: a means of financing the monastery during his (secular) life. A unique feature of annuity endowments, which would become more prominent in grants for such foundations in the fifteenth and sixteenth centuries, is also demonstrated by his patronage of Kastamonitou: the actual handing-over the sum of money from the founder to the grantees. In the case of Radič's annuity endowment, he was to receive the deputation of monks from Kastamonitou on the Feast Day of Saint George. The sovereign annuity endowments of Danubian rulers (discussed below) even included a separate sum to be paid to the monks collecting the annuity for the monastery. This ritualized payment of the annuity created a dynamic between founder and grantee very different from that of landed endowments: in the case of annuity endowments the bonds of the patronal relationship were renewed annually.

A dynastic foundation via annuity endowments, more along the lines of those of the Komnenoi and Grand Komnenoi, can be seen from the Branković family's patronage of Esphigmenou Monastery. Again, the basis of the endowment was the bonanza produced by Balkan silver mines: Novo Brdo, where one of the largest medieval silver deposits was located, was the basis of annuity endowment created by the Serbian despot George Branković (r. 1427–1456), who issued a charter in 1429. From this town's taxes he granted the monastery an annuity of 50 pounds of silver during his lifetime. Moreover, he directed a plea at his successors in the charter to preserve his foundation: "We also entreat him whom God chooses as heir to our throne after us, whether son or relation, or someone else, that the endowment should not be revoked, but confirmed. Should anyone prompted by envy or greed dare to revoke anything of what we have written above, let him be damned by the Almighty Lord God and by the chaste Mother of God and by the power of the holy and life-giving cross, by the twelve holy and supreme apostles, and by the three hundred and eighteen holy fathers in Nicaea."²²

Despite declining Serbian political fortunes, the monks of Esphigmenou tried to have the annuity renewed by the despot's descendants. Seventy years after the issuance of the charter of the annuity endowment, the monastery's abbot sought out John Branković, the grandson of George, and his mother Angelina. After he was informed of the promise his grandfather had made, John, although his financial

²² Esphigmenou Charter of Despot George 1989, 72 (Slavonic text), 73 (English translation); here quoting the English translation.

means were by comparison with his forebears quite limited, agreed to continue to pay the annuity to the degree that he could. If Providence smiled upon him and restored his family's rule over Serbia, he even agreed to render the full annuity that his grandfather had once paid [Slavonic Acts of Esphigmenou 1906, 45–46 (no. XXIV)]. Once again, the danger of sovereign annuity endowments is demonstrated by the ultimate fate of the annuity endowment for Esphigmenou: John died only three years later, in 1502, and with him the annual payment instituted by his grandfather. Even so, members of the Branković family continued to patronize Athonite monasteries in this period, such as Saint Paul and Vatopedi.²³

The Ottoman expansion and conquest of the Christian polities of the Balkans and Asia Minor spelled the end of many sovereign annuities discussed above. The geography of patronage of the prominent Orthodox monasteries in the Eastern Mediterranean shifted northward, to the princes (*voivodes*) of Moldavia and Wallachia.²⁴ The end result of this patronage, after centuries of endowing monasteries with land, was that both Moldavia and Wallachia were marked by monasteries owning a large portion of all arable land, around one quarter, in both countries: in 1863, when monastic lands were nationalized, some 27% in Wallachia and 22% in Moldavia [Coman 2012, 129]. This landed wealth, however, was not directly acquired via endowments, at least in the early phase of voivodes' Athonite patronage, who instead relied on the extensive use of sovereign endowments.

The annuity endowments of these rulers of Moldavia and Wallachia can be seen in many respects as a further development of the patronage patterns of Serbian rulers of the fourteenth and fifteenth centuries. Indeed, this image of being the successors of Serbian patrons (*ktitors*) is repeatedly emphasized in their charters for Athonite monasteries. Thus, in a charter of Vlad the Monk (r. 1482–1495) of November 1492 for Hilandar, we read how the monastery had become “orphaned” of patronage following the extinction of its Serbian patrons, with Mara Branković, the stepmother of Mehmet the Conqueror, then adopting the monastery as her own, before passing on this obligation to Vlad:

[. . .] le monastère appelé Chilandar, devenu orphelin de la très honorable seigneurie et des bienheureux *ktitôrs* serbes, en dernier lieu échu à la très honorable Dame et impératrice Mara dans sa vieillesse et ayant atteint une bienheureuse fin, nous ayant aimé et intégré à la place de ses enfants, et ayant avisé le susdit saint monastère, avec des paroles douces et nous ayant sollic-

²³ 500 gold coins annually for Saint Paul, endowed by Angelina, John Branković's mother [Medieval Slavic Acts 2018, 200–203 (St. Paul, no. 14)]; George Branković confirming an act of Stephen Lazarević granting Vatopedi a village and a yearly subsidy of 60 pounds of silver [Medieval Slavic Acts 2018, 274–277, 277–280 (Serbian act nos. 3 and 4)].

²⁴ The patronage of these Romanian princes for Mount Athos is well-studied: see, among many other contributions, Coman [2012]; Năsturel [1986].

ité comme ses enfants, attendu que le saint monastère est devenu orphelin de la très honorable seigneurie, de ne pas le délaisser, mais d'avoir soin de lui, de le chérir et d'être désigné comme le dernier *kititôr*.

C'est pour cette raison que nous nous rallions de tout cœur au saint monastère, après la bienheureuse dormition de la très honorable et bienheureuse susdite Dame et impératrice, notre mère Mara, ainsi que de sa sœur la Dame Cantacuzène, acceptant d'être désigné comme *kititôr* du saint monastère en le chérissant autant que nous pourrons, ce pourquoi nous nous engageons en délivrant ce chrysobulle, afin qu'il soit inaliénable pour le saint monastère, pour autant que nous pourrons, qu'il y ait une allocation de 5000 aspres en tout, soit chaque année, et que la somme versée aux frères qui viendront toucher l'allocation (soit) de 500 aspres.²⁵

Another feature of Serbian annuity endowments that was further developed by the voivodes was the role of monks travelling to the court of the sovereign to collect the annuity [Zahariuc 2019, 622 (Chilandar, nos. 2 and 4), 623 (Chilandar, nos. 6 and 7), 624 (Docheiariou, no. 2), 624–625 (Saint Panteleimon, no. 2), 617 (Koutloumousiou, no. 5), 625 (Philotheou, no. 1 and Kaproule, no. 1)]. The delegation of monks was promised a separate sum, usually around a tenth of the grant to the monastery. A further strand of continuity were the commemorative provisions in the charters of the annuity endowments, listing the names of the “founders” from the princely family, which were included with the grant [Zahariuc 2019, 624–625 (Saint Panteleimon, no. 2), 625 (Philotheou, no. 1)].

Though the endowments of the voivodes would later extend beyond the monasteries of Mount Athos to the Holy Land, the Monastery of Saint John the Theologian on Patmos and other prominent Orthodox sacred sites, this was a post-medieval development. Thus, the first annuity of a voivode for Patmos, dated 30 August 1584, is that of Peter VI of Moldavia (r. 1574–1577; 1578–1579; 1583–1591), by which he granted the monastery of Saint John the Theologian an annuity of 5,000 silver coins, in addition to 1,000 silver coins for the delegation of monks coming to receive the money [Romanian Charters from the Archive of the Monastery of Saint John the Theologian on Patmos 1970, 276–277 (no. 1)]. In exchange, he would be named the “new founder” of the monastery and have the names of himself and his family, 14 persons in all, commemorated.

Conclusion

²⁵ Acts of Romanian Princes from the Archives of Hilandar 2010, 130–131 (no. 2); here citing the accompanying French translation of the Slavonic text.

This contribution has documented the development and spread of the annuity endowment in the Byzantine world. Clearly, this form of foundation was an attractive alternative to endowing religious communities with land in particular contexts. Although perhaps due to the nature of the surviving sources, annuity endowments seem to have been particularly popular with sovereigns who wanted to patronize distant communities, as in the case with the Grand Komnenoi for Dionysiou on Mount Athos and Serbian rulers for the Monastery of the Archangels in Jerusalem.

Though the basic outline of the history of Byzantine annuity endowments has been sketched in this article, many of the details remain unclear. For instance, how did the dynamic between pragmatic (e.g. ease of transferring capital over long distances) and religious (e.g. disdain for monastic landholding) concerns play out in particular instances of patronage? The latter is certainly discernible in the annuities granted for the Great Lavra on Mount Athos, but in other cases the reason for deciding upon an annuity endowment cannot be determined. Though not available in every case, a careful evaluation of sources stemming from patrons and grantees would probably allow for more definitive conclusions as to why annuity endowments were employed in particular contexts.

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