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THE FOUNDATION AND ORGANIZATION OF A PERIPHERAL MONASTERY ACCORDING TO A SIXTEENTH-CENTURY SOURCE: CASE VALAAM¹

This chapter examines the early phases of a peripheral Orthodox monastery called Valaam as depicted in a text deriving from the 1550-1570s. "The Tale of the Monastery of Valaam" seems to have been lost and forgotten until the 1980s when it was discovered by historian Natalia Okhotina-Lind. This text includes a detailed description of the somewhat violent foundation of the monastery, supported by the archbishop of Novgorod, at the turn of the fifteenth century. Furthermore, it depicts the organization and the monastic rule of Valaam, and the internal struggles it faced during its early existence. The context for the production of the text was the contemporary consolidation of Muscovite power, reflected in and reinforced by the remarkably growing number of "domestic" saints. The author argues that "The Tale of the Monastery of Valaam" was an attempt to create a basis for a much-needed founder cult of Valaam when conventional hagiography was out of the question because of awkwardness and a lack of clarity concerning its foundation, founders and early phases. However, the development of the founder cult was halted when the area was annexed by Sweden at the beginning of the seventeenth century and the monastery was abandoned. The alleged founders of Valaam were officially venerated at an imperial level only in 1819, when the monastery – refounded a century earlier – was rapidly growing in prestige, wealth and fame. "The Tale of the Monastery of Valaam" offers a valuable glimpse of the challenges a peripheral, northern monastery had to deal with during the fifteenth and sixteenth century.

Keywords: monastery, Orthodox Church, medieval, saint, Karelia, Moscow, founder cult

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INTRODUCTION

Monasteries emerged in Rus'² from the eleventh century onwards. At first, they were mostly groups of small idiorrhythmic dwellings, each monk living a separate life of prayer and ascetism, and they were mostly founded and supported by princes and other representatives of the elite.³ The cenobitic, or communal, form of monastic life was established in the region during the latter half of the fourteenth century. Its consolidation was encouraged by and intertwined with the spread of the Hesychastic⁴ ideas which were developed in the Byzantine monasteries of Mount Athos, which emphasized withdrawal from the “world” as a spiritual endeavor. This development led to the foundation of numerous monastic settlements in the northern wilderness areas where Moscow contested Novgorod’s dominance.⁵

The peripheral frontier area known as Karelia, nowadays located in Northwestern Russia, was loosely governed by Novgorod until 1478, when Novgorod was annexed by Moscow. Novgorod was generally more interested in trade than, for instance, effective taxation of the surrounding areas, so secular power structures were developed in the Karelian area only from the sixteenth century onwards. The influence of the Orthodox Church was also very limited amongst Karelians despite Novgorod’s having an archbishop’s seat.⁶

At present it appears that the first monasteries in the area, Valaam and Konevets, were founded on islands in Lake Ladoga at the turn of the fifteenth century. Determining the date of Konevets’s foundation has been easier, as the event is mentioned in several chronicles.⁷ But in the case of Valaam it is more complicated, as only sporadic, contradictory and rela-

2 I use this concept to cover Kievan Rus’ and other medieval eastern Slavic principalities, which from the fourteenth century onwards were increasingly eclipsed and annexed by Moscow.

3 М. И. Блѣхова, «Монастыри на Руси XI – середины XIV века», в *Монашество и монастыри в России XI-XX века*, ред. Н. В. Сеницына (Москва: Наука, 2002), 25–56.

4 *Hesychia* means stillness, or inner peace, in Greek.

5 See, e. g., Б. М. Клосс, «Монашество в эпоху образования централизованного государства», в *Монашество и монастыри в России XI-XX века*, ред. Н. В. Сеницына (Москва: Наука, 2002), 122–124.

6 JUKKA KORPELA, *The World of Ladoga: Society, Trade, Transformation and State Building in the Eastern Fennoscandian Boreal Forest Zone* (Berlin: LIT Verlag, 2008), 235–240.

7 See, e. g., «Новгородская третья летопись», в *Полное собрание русских летописей*, Том III (Санктпетербург: Типография Едуарда Праца, 1841), 233. See also А. Г. Бобров, *Новгородские летописи XV века* (Санкт-Петербург: ДмитриИ Буланин, 2000), 114–117, 122–123.

tively late mentions have survived concerning the early existence of the monastery.⁸ One reason for the minimal amount of information is that both island monasteries were abandoned in the beginning of the seventeenth century, when the area was annexed by Sweden. Only after a full century was it regained by Russia, and the monasteries of Valaam and Konevets re-established.

This lack of textual information, however, allowed for more grandiose claims when the resurrected Valaam – now conveniently located close to the new capital, St Petersburg – rose in fame and prestige during the eighteenth and nineteenth centuries. For instance, it was suggested that Valaam might have been founded as early as the tenth century, which would have made it the oldest monastery in imperial Russia, older even than the Kyiv Pechers'ka Lavra in Ukraine. Such speculations, which mostly emerged during the nineteenth century, were intertwined with Nationalist and Romanticist movements. They were based on very bold interpretations and interpolations of heterogeneous sources; sometimes they were simply made up.⁹

It was only in the 1980s that a “new” textual source on Valaam’s early phases emerged. It was discovered by N. A. Okhotina-Lind in the Russian State Library, Moscow, where it had been preserved in their collection of church music. The manuscript called “The Tale of the Monastery of Valaam” (*Skazanie o Valaamskom monastyre*) was meticulously dated, analysed and edited for publication by Okhotina-Lind.¹⁰ The text, referred to as the *Skazanie* in this chapter, derives from the late 1550s, but the only known preserved copy was written in 1560-70.¹¹ It offers a surprisingly detailed

8 The first mentions of the Valaam monastery can be found in hagiographies preserved as sixteenth-century copies (Savvati of Solovki, Aleksandr of Svir) and in certain administrative documents compiled also in the sixteenth century. Before the discovery of *Skazanie o Valaamskom monastyre*, the first references to the monastery’s alleged founders Sergei and German could be found in seventeenth-century codices and ecclesiastical documents. Yet another source is *Valaamskaia beseda* [Valaam Conversation/Debate], a polemical text that survived in seventeenth-century copies but contributed to the sixteenth-century discussions on monastic property (see, e. g., JOHN LIND, “Sources and Pseudo-Sources on the Foundation of the Valamo Monastery”, *Scandinavian Journal of History* no. 2 (1986): 115–133. KATI PARPPEI, “The Oldest One in Russia”: *The Formation of the Historiographical Image of Valaam Monastery* (Leiden: Brill Academic Publishers, 2011), 81–84).

9 For an overview of this discussion, which has had academic as well as popular dimensions, see PARPPEI, “The Oldest One in Russia”, 81–92, *passim*.

10 Н. А. ОХОТИНА-ЛИНД, *Сказание о Валаамском монастыре* (Санкт-Петербург: Глагол, 1996).

11 ОХОТИНА-ЛИНД, *Сказание о Валаамском монастыре*, 28–32.

narrative on the foundation (which, according to this source, took place between 1388-1415; the date is not explicitly mentioned, but can be deduced from different details), the founders and the organization of the monastery, and the events – including miracles – which took place during its early existence in the fifteenth and sixteenth century, before its abandonment.

Most often, such themes were covered in “lives” (*zhitiia*), hagiographic texts on monastic founders, but in this case the text takes the form of a “tale” (*skazanie, povest’, or slovo*), which often reports a certain historical event, or, in the case of Valaam, a whole continuum of events. The *Skazanie*, however, has features which strongly suggest that the main function of the text was to consolidate the founder cult of Sergei and German, as we shall see. Nevertheless, it was not until 1819 that the founders were officially venerated on an imperial, all-Russian level. In the Orthodox Church the canonization process has not been as strictly regulated as in the Roman Catholic church,¹² so the veneration of Sergei and German took place by basically including them in the saintly calendar as the saintly founders of Valaam.¹³

The fact that – at least so far – only one copy of the *Skazanie* has been found suggests it was never a widely distributed piece of literary tradition. According to Okhotina-Lind, this is in accordance with the general nature of this “genre” of texts: stories of monasteries were often produced in peripheral monastic settlements, and they never became well-known enough to spread beyond the local or regional level.¹⁴ Okhotina-Lind suggests that the author of the *Skazanie* did not live in Valaam – he uses the third person when referring to the brethren – but knew the place very well. According to her, he might have belonged to the inner circle of the archbishop of Nov-

12 While in the Roman Catholic church canonization has been reserved for the Holy See from the thirteenth century onwards, in the Orthodox church the protocol remained relatively unregulated despite Metropolitan Makarii’s systematic veneration of new Russian saints in 1547 and 1549. Until the religious reforms by Peter the Great, a person could be proclaimed a saint based only on the veneration of a local congregation, but after 1721, the Holy Synod began to control the processes of canonization of saints and make the final decisions on them (see, e. g., KARIN H. CHRISTENSEN, *The Making of the New Martyrs of Russia* (London: Routledge, 2017), 22).

13 The official recognition of the founder saints was preceded by Hegumen Innokentii’s (1801-1823) futile appeals to the Holy Synod on the issue, but it took place only after the visit of Tsar Alexander I to Valaam in 1819, during which the hegumen was able to personally appeal to the tsar to have the saints venerated (see, e. g., ОНУФРИЙ, иеродиакон (МАХАНОВ), *Причал молитв уединенных. Валаамский монастырь и его небесные покровители преподобные Сергей и Герман* (Санкт-Петербург: Издательство Царское Дело, 2005), 611–612. PARPPEI, “*The Oldest One in Russia*”, 43).

14 Н. А. ОХОТИНА-ЛИНД, «Древнерусские сказания о монастырях XV-XVII вв. как явление литературы», *Scando-Slavica*, том. 40 (1994): 152.

gorod.¹⁵ In any case, the author had his reasons to depict the monastery and its founders in a favorable light. However, as we shall see, the text also includes details which do not quite fit into a stereotypical medieval narrative. Those details offer insight into the process of founding and establishing a monastic community in a peripheral frontier area.

In this study I will briefly examine and contextualize certain events and issues depicted by the *Skazanie*: the foundation of the monastery, its organization, an internal conflict and its consequences, and the apparent attempts to consolidate the founder cult. This work draws heavily on Okhotina-Lind's research in the 1990s and on my monograph on the formation of Valaam's historiographical image, published in 2011.¹⁶

THE VIOLENT FOUNDATION OF VALAAM

Despite its peripheral location in relation to Slavic centers, the area of Lake Ladoga was not a vacuum in the fourteenth century, when monks arrived to found monastic settlements; it was not an empty wilderness devoid of people or religious practices. Instead, it was inhabited by people speaking some form of Finno-Ugric and practicing indigenous religion(s).¹⁷

The author of the *Skazanie* describes the archipelago of Valaam, the geography of the region of Lake Ladoga, and its rich natural resources in detail. He mentions that the area used to be inhabited by the "Chud people" living between "two peoples – the Rus' and the Nemtsy."¹⁸ In accordance with the medieval dualistic world view, the Chuds – also referred to as

15 ОХОТИНА-ЛИНД, *Сказание о Валаамском монастыре*, 32.

16 PAPPPEI, "The Oldest One in Russia".

17 See, e. g., КАТИ PAPPPEI, "Early Population in the Ladoga Region", in *Lake Ladoga: The Coastal History of the Greatest Lake in Europe*, ed. MARIA LÄHTEENMÄKI (Helsinki: Finnish Literature Society, 2023), 69–88.

18 «Сказание о Валаамском монастыре», в *Сказание о Валаамском монастыре*, ред. Н. А. ОХОТИНА-ЛИНД (Санкт-Петербург: Глагол, 1996), 158–161. The translations are mine. "Chuds" in Slavic sources have often been interpreted as Finno-Ugric groups without more precise definition (see, e. g., JANNE SAARIKIVI, *Substrata Uralica: Studies on Finno-Ugric Substrate in Northern Russian Dialects* (Academic dissertation. University of Helsinki, 2006), <https://helda.helsinki.fi/items/8578da45-6017-45e0-8ef0-205168d012bd> (Accessed June 19, 2024)), 29. "Nemtsy" meant literally people who could not speak, but applied not only to "Germans" but Northern Europeans in general. See this latter issue in another section of this book. On naming "otherness" in medieval Slavic sources, see JOHN LIND, "Consequences of the Baltic Crusades in Target Areas: The Case of Karelia", in *Crusade and Conversion on the Baltic Frontier*, ed. ALAN V. MURRAY (Aldershot: Ashgate, 2001), 137–142.

*korela*¹⁹ – are depicted as ignorant pagans who worship demons and rely on sages and soothsayers and are not able to appreciate the apparent generosity of their Creator.²⁰

However, the archipelago was predestined to become a sacred place in God’s divine plan; for instance, the author described how the inhabitants of the area were the first to call the place “Valaam,” echoing the name of the Biblical figure Balaam.²¹ Moreover, in the *Skazanie* there is a description of Apostle Andrew’s visit to Novgorod and his prophecy concerning the foundation of the island monasteries of Ladoga:

And while sailing on the immense Nevo lake he looked to the north on the Karelian side and spoke like this: ‘As new Canaanites, godless people of magi are living there now, but in the future two torches will shine among them.’ This, they say, was what Christ’s Apostle spoke about the glorious and great monasteries, Valaam and Konevets.²²

This story is a local interpolation of the accounts of the apostle’s travels around the Slavic world. The *Povest’ vremennykh let*, also known as the *Primary Chronicle*, includes a description of how the Apostle Andrew travelled along the river Dnepr to the future locations of Kiev and Novgorod. The story was put to full use in the major sixteenth-century Muscovite compilations, the so-called *Nikon[’s] Chronicle* and the *Stepennaia kniga* [Book of Degrees],²³ which were produced to add to the prestige of the realm of Moscow and the ruling dynasty by inventing for them historical roots forming a single continuum.²⁴ In the *Skazanie*, apparently, its func-

19 «Сказание о Валаамском монастыре», 162–165. “Korela” in early Slavic textual sources refers to the name of a fortress (Kexholm in Swedish) located on the western shore of Ladoga as well as to a group of people, often interpreted as “Karelians” (see, e. g., «Новгородская первая летопись», в *Полное собрание русских летописей*. Том III (Санктпетербург: Типография Едуарда Праца, 1841), 9, 20, 66, 70, etc).

20 «Сказание о Валаамском монастыре», 160–161.

21 «Сказание о Валаамском монастыре», 162–165. Biblical references were a typical feature in medieval texts, but the author of the *Skazanie* uses them relatively sparingly.

22 «Сказание о Валаамском монастыре», 160–161.

23 The book, apparently compiled in the aftermath of the conquest of Kazan in 1552 and celebrating the union of church and state, consists of 17 chapters, or “steps”, each of which represents a generation of the ruling dynasty of Moscow. The first step is Vladimir the Great and the last one Ivan IV (see, e. g., GAIL LENHOFF, “Politics and Form in the *Stepennaia Kniga*”, in *The Book of Royal Degrees and the Genesis of Russian Historical Consciousness*, ed. GAIL LENHOFF and ANN KLEIMOLA (Indiana: Bloomington, 2011), 157–174).

24 «Лаврентьевская летопись», в *Полное собрание русских летописей*. Том I (Санктпетербург: Типография Едуарда Праца, 1846), 3–4. «Летописный сборник, именуемый

tion was to add similar prestige to the monastery of Valaam and consolidate the justification of its foundation as a predestined event (the same holds true for the Biblical references, which are a stereotypical feature of any medieval text). Later on, a legend of Apostle Andrew's visit to Valaam became a firm part of the monastery's "myth-history," mostly compiled during the nineteenth century. As the sole known copy of the *Skazanie* was found only in the 1980s, this indicates either the preservation of the sixteenth-century story in the form of oral, local tradition, or its independent re-emergence, perhaps once again as a somewhat logical interpolation in the accounts of the apostle's visit to Novgorod.²⁵

The account in the *Skazanie* of the initial arrival of the monks from Novgorod to Valaam relies on a stereotypical medieval template of the servants of God having a twofold mission: to spread Christianity to peripheral "pagan" areas and to found quiet places for meditation and worship. However, according to the author, once they had started settling on one of the islands, the inhabitants of the archipelago of Valaam "got very angry at the holy monks, using witchcraft in alliance with demons and doing a lot of harm."²⁶ After this altercation, events take a curious turn. One of the monks, Sergei – "being worried about the establishment of the monastery as well as feeling a great concern for the enlightenment of the Chuds living in darkness"²⁷ – goes to ask Archbishop Ioann of Novgorod for assistance. The archbishop, seeing the importance of the mission, contacts the Novgorodian *posadniki* (governors), and ends up providing both financial and military aid for the monks.²⁸

Sergei goes back to Valaam with the Novgorodian envoys, but a bloody encounter follows when they start to expel people from the island and meet with resistance:

патриаршей или Никоновской летописью», в *Полное собрание русских летописей*. Том X-XI (Москва: Языки русской культуры, 2000), 3–4. «Книга Степенная царского родословия», в *Полное собрание русских летописей*. Том XXI (Санкт-Петербург: Типография Эдуарда Праца, 1908), 7. See also И. С. Чичуров, «Хождение апостола Андрея' в византийской и древнерусской церковно-идеологической традиции», в *Церков, общество и государство в феодальной России*, ред. А. И. Клибанов (Москва: Наука, 1990), 9–10. DAVID B. MILLER, "Velikie Minei Chetii and the Stepennaia Kniga", *FZOG* vol. 26 (1979), 273–276.

25 PAPPÉI, "The Oldest One in Russia", 102–109.

26 «Сказание о Валаамском монастыре», 164–167.

27 «Сказание о Валаамском монастыре», 166–167.

28 Ibid.

There were heavy losses amongst the vile sorcerers, and they [the soldiers] defeated them and killed many of them by the hand of the Almighty Christ and God, and thus the envoys soon drove them away from the island. Also, some of the reverent monks died of deadly wounds.²⁹

Harsh treatment of pagans as such is yet another stereotypical feature in foundation stories of monasteries – for instance, the hagiography of Zosima and Savvatii Solovetskii, the alleged founders of the Solovki monastery (founded in 1430), describes how the reluctant inhabitants of the future monastic island were chased away by miraculous apparitions of two young men.³⁰ In the case of the *Skazanie*, however, the operation is carried out not by any divine intervention but by a very concrete military operation ordered by the archbishop of Novgorod. This kind of realism is not a common feature in medieval texts, and it can be assumed that the account may well refer to actual events as they were remembered some 150 years later.

Further, this process reflects the twofold function of the foundation of monasteries in peripheral areas. First, there was the ideal of the Hesychastic movement, an urge to find remote and quiet places for ascetic life in monastic settlements. Second, the foundation undoubtedly served the interests of the state. Even though Novgorod was not especially active in controlling the scarce population of its nearby areas (for instance, taxation was developed in earnest only by Moscow after the annexation of Novgorod in 1478),³¹ it was in its interests to consolidate the Orthodox Christian power structures in those areas and to try to ensure the loyalty of their inhabitants in order to block Sweden from doing the same with Catholic foundations. Monasteries can be seen not only as spiritual centers, but also as monuments of dominance, especially in remote, contested regions such as Karelia.³²

29 «Сказание о Валаамском монастыре», 168–169.

30 «Житие Зосимы и Савватия Соловецких в редакции Волоколамского сборника», в *Житие и чудеса преподобных Зосимы и Савватия Соловецких чудотворцев*, ред. С. В. МИНЕЕВА (Курган: Издательство Курганского государственного педагогического института, 1995), 19. See also JUKKA KORPELA, “Pyhä Herman Solovetskilainen”, *Ortodoksia* 49 (2002): 118. ROY R. ROBSON, *Solovki: The Story of Russia Told Through its Most Remarkable Islands* (New Haven: Yale University Press, 2004), 14–15.

31 KORPELA, *The World of Ladoga*, 235–240.

32 JOHN LIND, “Politico-religious landscape of medieval Karelia”, in *Fennia: International Journal of Geography. Karelia – Bicultural Landscape: Special Issue*, ed. MAUNU HÄYRYNEN and PETRI RAIVO (Vammala: Geographical Society of Finland, 2004), 7–8.

Nevertheless, in any medieval narrative, pragmatic, political or religious motives – very often seamlessly intertwined! – related to interaction with non-Christian peoples and groups had to be clad in a pious urge to save the souls of godless people who did not yet know their Creator, especially in cases involving conflicts between the newcomers and indigenous inhabitants. “The end justifies the means” policy is reflected also in the *Skazanie*’s untypical depiction of the involvement of the Novgorodian soldiers in the foundation of a monastery, explicitly formulated in the description of Sergei’s reasons for approaching the archbishop with the monks’ problem.

MONASTIC RULE AND ORGANIZATION

Contrary to the established view, according to which Valaam was founded by the venerable monks Sergei and German, in the *Skazanie* the initial founder is presented as a monk called Efrem. However, according to the text, Efrem very soon moved on to found the monastery of Perekomsk,³³ while his companion Sergei remained and tackled the problem of hostile inhabitants with the assistance of the archbishop of Novgorod. After that, he continued to act properly in establishing the monastic settlement on the main island:

After that glorious victory, venerable Sergei chose a place for the monastery according to God’s wishes, beautiful and high, on a rocky mountain, visible from every direction, like a town, and beneath was a wonderful, large, tranquil bay in which ships could be anchored for protection from waves.³⁴

After choosing the spot for the new monastery – the description of which perfectly applies also to the location of the monastery refounded in the eighteenth century – Sergei continued his work by building two churches, one “with the blessing of the most holy Archbishop in the name of the

33 It was located in Novgorod, near the village of Dubrovo, on the western side of Lake Il'men. Efrem's hagiography dates his life to the fifteenth century and the foundation of Perekomsk monastery to 1450, which contradicts the narrative of the *Skazanie*. However, the hagiography is considered a mixed piece of literary tradition, produced perhaps only in the seventeenth century when the deserted monastery was refounded. The Novgorod Third Chronicle dates the foundation to 1407, which would support the information provided by the *Skazanie* (see PAPPÉI, “*The Oldest One in Russia*”, 199–204).

34 «Сказание о Валаамском монастыре», 168–169.

God-pleasing Transfiguration of our Lord, God and Saviour Jesus Christ,” which gave its name to the whole monastery. The other one was “a very wonderful and glorious church dedicated to the Nativity of Our Lord, God and Saviour Jesus Christ, with a refectory.” The monastery was built in the shape of a cross, with four walls and two gates.³⁵

Furthermore, Sergei reportedly set the monastic rule (*zakon monastyrskii*) “in accordance with the sacred dogmas that only the most necessary things for the needs of human nature should be kept in the monastic storehouses.”³⁶ According to the author of the *Skazanie*, he ordered only the most simple and plainly prepared food to be served in the monastery, even on feast days, and instead “to indulge in spiritual joy in the Holy Spirit, when carnal joy and gluttony are completely cut off.”³⁷ Further, Sergei forbade the consumption of any intoxicating drinks; only a moderate amount of *kvas*³⁸ was allowed for the monks and visitors alike.³⁹

Regarding clothing, Sergei’s monastic rule was equally strict:

The clothing of the monks should not cost much, and it should not be beautiful to look at. But in monastic form it should only serve to cover oneself, also a simple fur coat and *sermiaga*,⁴⁰ like those which servants wear, as having anything else will only bring suffering in the future. Do not have extra clothes or very expensive ones at all.⁴¹

According to the *Skazanie*, Sergei explicitly emphasized equality in his instructions. For instance, he forbade asking for large donations from those wishing to join the brethren, but explicitly ordered that everyone, also

35 Ibid. In general, there was no pattern for dedications of altars and churches. Jukka Korpela has pointed out that the consolidation of the cult of the Mother of God seems to be related to the expansion of Moscow and to the idea of her being the holy protector of the city. This, according to him, might explain why at the turn of the fourteenth century lots of new churches and monasteries were dedicated to her. Valaam was an exception, perhaps because its foundation was conducted from Novgorod (JUKKA KORPELA, *Viipurin linnaläänin synty. Viipurin läänin historia II* (Jyväskylä: Gummerus Kirjapaino Oy, 2004), 196).

36 «Сказание о Валаамском монастыре», 170–171.

37 Ibid.

38 A fermented, cereal-based, low-alcohol beverage.

39 «Сказание о Валаамском монастыре», 170–171.

40 A woolen coat or a caftan.

41 «Сказание о Валаамском монастыре», 170–171. For instance, in Solovki monastery in the sixteenth century the “clothing policy” was more liberal; the monks were allowed have three fur coats and also other additional garments upon discussion (ROBSON, *Solovki*, 39–40).

“common people,” be welcomed into the community.⁴² He assigned everyone residing in the monastery to work for the common good (saying, however, that there should be a foreman [*nariadnik*], one of the elders, whom everyone should obey), to eat the same food and wear similar clothes, from the hegumen⁴³ to laypeople and shepherds – as “good equality is given to all in Christ.”⁴⁴ Moreover, troublemakers were not to be punished but instead sent away from the monastery to avoid further problems (here the author refers to a Bible verse “a little yeast leavens the whole batch of dough” [1 Corinthians 5:6-8]).⁴⁵

What can we make of these instructions allegedly compiled by monk Sergei? It seems that written rules for individual cenobitic monasteries began to emerge in Rus’ during the fifteenth century. They were based on more general Byzantine rules on liturgical life (the so-called “Rule of the Studion” was replaced by the “Rule of Jerusalem” around the same time as the number of monasteries increased). Sergei of Radonezh, a monk firmly connected with the Muscovite core of ecclesiastical and secular power, has been seen as the main executor of monastic reform in Moscow during the latter half of the fourteenth century, while it has been suggested that in Novgorod direct connections with the Holy Mountain, Athos, may also have contributed to the development of Hesychastic, cenobitic monastic life, discipline and practices.⁴⁶

The monastic rule of Sergei of Valaam is one of six medieval examples known to us, and as Okhotina-Lind points out, if we boldly assume that they were all initially produced by the founders of the monasteries, it is one of the earliest ones, deriving from the turn of the fifteenth century.⁴⁷ In

42 «Сказание о Валаамском монастыре», 170–173.

43 The head of a monastery.

44 «Сказание о Валаамском монастыре», 170–171.

45 Ibid.

46 Клосс, «Монашество в эпоху образования централизованного государства», 57–65; ОХОТИНА-ЛИНД, *Сказание о Валаамском монастыре*, 82, 88. DAVID B. MILLER, *Saint Sergius of Radonezh, His Trinity Monastery and the Formation of the Russian Identity* (DeKalb: Northern Illinois University Press, 2010), 27–31. According to his hagiography, Arseni of Konevets had lived in Athos prior to the foundation of Konevets Monastery. At the end of the eighteenth century, the idea emerged that Sergei of Valaam had been a Greek monk – a notion probably arising from the general Greek “trends” in the Russian Orthodox Church, but the possibility of Sergei’s actually having spent time in Athos at some point in his life cannot be excluded (see, e. g., ПАРПЕИ, “*The Oldest One in Russia*”, 155–160).

47 The other five rules are attributed to the following monastic figures: Evfrosin of Pskov, Iosif of Volotsk, Kornilii of Komel, Gerasim of Voldin and Pavel of Obnora (ОХОТИНА-ЛИНД, *Сказание о Валаамском монастыре*, 82).

addition, individual details concerning monastic discipline can be found in texts such as hagiographies and letters.⁴⁸ However, we apparently do not know whether Sergei's Rule originated later or to what extent it was edited along the way. We do not know, either, whether the author of the *Skazanie* included in his text a full or a shortened version of the rule.⁴⁹

All surviving Rus(s)ian medieval monastic rules differ quite notably from each other when it comes to their form, and they do not seem to have any common source, even though they share similar elements when it comes to how to organize a cenobitic monastic life and community – for instance, they all (not unexpectedly) emphasize ascetic endeavors, communal meals and so forth.⁵⁰ According to Okhotina-Lind, who has compared the Rule of Sergei with the others, it has most similarities with the rule attributed to Gerasim Voldinskii, who founded the Ioanno-Predtechenskii monastery in 1535 in Smolensk. The similarities are not of a textological nature, but can be detected on the level of ideas.⁵¹ In the light of the available information it is impossible to say whether the Rule of Gerasim was influenced by Sergei's initial rule, or whether the monastic practices and regulations in Valaam during the latter half of the sixteenth century – attributed by the author of the *Skazanie* to Sergei – were influenced by the monastic Rule of Gerasim, or whether, perhaps, there was some other, unknown common denominator between the Rules, or no connection beyond general traits shared by early Russian monasticism.

In comparison to other medieval monastic rules, Sergei's Rule lacks typical features such as a detailed description of the prayer rule and regulations concerning attending services in the church. Furthermore, it does not emphasize hierarchy and obedience to the head of the monastery, but instead, more emphatically than the others, brings to the fore the importance of collective asceticism and equality.⁵² On the other hand, in some respects Sergei's Rule is stricter than the others: for instance, not all of them categorically forbid the use of alcoholic drinks (besides the moderate consumption of *kvas*). Also, while in Sergei's Rule wrongdoers were not to be punished, but instead sent away from the monastery, some other

48 Клосс, «Монашество в эпоху образования централизованного государства», 62–65.

49 ОХОТИНА-ЛИНД, *Сказание о Валаамском монастыре*, 86.

50 Клосс, «Монашество в эпоху образования централизованного государства», 62–65. See also ALLAN T. SMITH, *The Volokolamsk Paterikon: A Window on a Muscovite Monastery* (Toronto: Pontifical Institution of Mediaeval Studies, 2008), 60.

51 ОХОТИНА-ЛИНД, *Сказание о Валаамском монастыре*, 86.

52 ОХОТИНА-ЛИНД, *Сказание о Валаамском монастыре*, 83–85.

rules give them a chance to repent and correct their ways before resorting to expulsion.⁵³ Another relatively “radical” point in Sergei’s rule is the prohibition on bringing donations upon entering the monastery, which seems to have allowed a certain amount of social mobility in terms of joining monastic life.⁵⁴

One could suggest that some aspects of Sergei’s monastic rule – whether it was originally formulated upon the foundation of the monastery or not – might indeed have had practical dimensions related to Valaam’s location and surroundings. For instance, a remote island monastery would have greatly benefited from monks with a common background in agriculture, fishing and so forth, perhaps even those coming from nearby areas, as the influence of the monasteries gradually contributed to the spread of the Christian world view and practices and the overall interaction between Karelians and the monasteries increased.⁵⁵ While these people may not have been able to donate money to the monastery, they brought practical skills and were accustomed to hard work. Apparently, the policy had worked, as in the 1560-70s, by the time of the writing of the *Skazanie*, the number of monks in Valaam was “more than 100.”⁵⁶

Similarly, strict emphasis on ascetism and equality in both work and leisure would have contributed to the disciplined monastic life in hard and bleak northern circumstances. Likewise, the strict regulation of the consumption of alcohol seems especially reasonable in a monastery like Valaam, as intoxicating drinks could have potentially caused diverse problems in an isolated island community. Unfortunately, due to the lack of sources, the rule allegedly compiled by Sergei of Valaam cannot be compared with the medieval rules of other northern island monasteries with similar circumstances, such as Konevets or Solovki, to see whether they had similar emphasis.

53 Ibid.

54 ОХОТИНА-ЛИНД, *Сказание о Валаамском монастыре*, 85.

55 On pilgrimages and other relations of the Karelian population with the nearby monasteries in the sixteenth century, see, e. g., KATI PARPPEI, “Ja pian jo parantuivat ja lähitivät terveinä koteihinsa’ – pyhiinvaellukset luostareihin ortodoksisessa Karjalassa”, in *Suomalaisten pyhiinvaellukset keskiajalla – Kun maailma aukeni*, ed. SARI KATAJALA-PELTONA, CHRISTIAN KRÖTZL and MARJO MERILUOTO-JAAKKOLA (Helsinki: Finnish Literature Society, 2014), 341–353.

56 «Сказание о Валаамском монастыре», 172–173.

INTERNAL PROBLEMS AND THE TRANSFER OF THE RELICS

Even if Sergei's monastic rule was actually formulated during the early existence of Valaam monastery, it appears to have initially failed in creating a foundation for a fully functional monastic community. In addition to reporting the early violent treatment of the local inhabitants, the narrative in the *Skazanie* takes another surprisingly realistic turn after the description of the foundation of the monastery. According to the author, a serious conflict took place between Hegumen Sergei and some of the brethren. No reason is given, but the Devil is blamed for tempting the "weak-minded" monks to turn against the "Holy and Great Igumen Sergei."⁵⁷ His attempt to settle the issue by leaving the monastery to live like a hermit on a nearby island did not lead to the intended result. Instead, "the unsatiated devil, always scorned by him, was not satisfied with the first sedition, but wanted to chase the saint away from his own former abode."⁵⁸

The details of the "second battle" launched by the Devil in order to drive Sergei away from Valaam are not described by the author, only its outcome: Sergei left the archipelago and moved to Novgorod to reside in the monastery of John the Theologian. There, according to the *Skazanie*, he spent the rest of his lengthy life writing holy books and was buried in the monastery church (later on, his remains were transferred to Valaam, as we shall see).⁵⁹

In the context of the monastic rule described above, this is a somewhat surprising turn: instead of simply sending the troublemakers away from the monastery, Sergei himself decided to leave. The account does not seem to refer to a conflict involving only a couple of monks – who could have been expelled from Valaam according to the monastic rule – but a more serious crisis in the monastery, perhaps related to a questioning of Sergei's leadership. But the laconic description of the events in the *Skazanie* provides no basis for further speculation.

Notably though, once again, the author resorts to stereotypical medieval rhetoric by blaming the Devil for the disorder, thus externalizing its root cause. In light of the medieval worldview, disorder in a Christian

57 «Сказание о Валаамском монастыре», 172–173.

58 Ibid.

59 Ibid.

community had to be depicted as a sign of diabolical intervention, as unity was a divine virtue and as such incompatible with discord and dissonance. Moreover, a storyline presenting a saint being ruthlessly harassed by the devil is also a stereotypical feature of medieval hagiographical texts, having its origins in the temptations of Christ himself.⁶⁰

Sergei remains a somewhat obscure figure in the *Skazanie* – for instance, we are told nothing about his life prior to founding Valaam monastery besides the author’s assumption that the monks came from Novgorod – but the description of the background and activities of his successor German is even more laconic:

After the Holy Hegumen Sergei, the ever-memorable German who, as a priest, shared all of the earthly work with the Holy Sergei, became the hegumen in the aforementioned Valaam monastery. This great German took good care of Christ’s flock as it was entrusted to him and lived his pure life as well as bodily imperfection allowed. And in old age after a long life among his flock in the monastery they had established, he passed on from this life to God and was buried there.⁶¹

The somewhat obscure seventeenth- and eighteenth-century chronicle tradition concerning Valaam includes the idea of the transfer of Sergei and German’s remains from Novgorod back to Valaam in 1163 (this has been one premise for dating the foundation of Valaam centuries earlier than, for instance, the *Skazanie* suggests). It has been assumed that the remains were taken to Novgorod because of the restlessness of the border region.⁶² However, in the *Skazanie* there is a lengthy and detailed description of how Sergei’s remains were taken to Valaam and reunited with those of German in the sixteenth century (between 1542 and 1551, not long before the production of the text; the author even mentions the events having taken place “during our days and being known to everyone”).⁶³ This act, personal-

60 See, e. g., JUKKA KORPELA, “Konstantinuksen lahjakirja – näkökulmia keskiaikaiseen to-
tuuteen”, *Historiallinen Aikakauskirja*, Vol. 1 (1995), 62. MICHAEL CHERNIAVSKY, *Tsar and
People: Studies in Russian Myths* (New Haven: Yale University Press 1961), 6–7, 26–27. A
similar case – the head of the monastery leaving because of inner conflicts instigated
by the Devil – can be found in the hagiography of Sergei of Radonezh (see, e. g., MILLER,
Saint Sergius of Radonezh, 22–23).

61 «Сказание о Валаамском монастыре», 172–174.

62 See, e. g., LIND, “Sources and Pseudo-Sources on the Foundation of the Valamo Monas-
tery”, 120–123.

63 «Сказание о Валаамском монастыре», 178–189.

ly carried out by Hegumen Pimen, symbolically returned the lost harmony caused by the conflict between Sergei and the brethren:

Hegumen Pimen, great in mind, sanctified by spiritual blessings, took good counsel in his heart to bring the aforementioned founder of this monastery, the Holy Hegumen Sergei, his holy relics, from the great Novgorod to Valaam monastery, which he had built; and, with his favored cohabitant, German, who was the hegumen after him, to place both of their holy relics together in one shrine, in order to erase the early enmity created by a demon, which some weak-minded monks had incited against Holy Sergei...⁶⁴

The author of the *Skazanie* writes that Pimen went to meet Archbishop Feodosii of Novgorod in order to get permission for the transfer (which, according to the text, was the will of Sergei himself, and ultimately, God's will). Feodosii, "not daring to act alone," writes to Metropolitan Makarii and the "holy council," sending Pimen to Moscow for further advice. The metropolitan, in his turn, consults Tsar Ioann (Ivan IV). Permission is finally granted, and Pimen returns to Valaam with the relics. On his way back he stops in Konevets due to strong winds, which he interprets as Sergei's will to go and visit his old friend Arseni, the founder of Konevets monastery. The remains of Sergei and German are both uncorrupted (German's remains had, according to the author, also survived a fire in the monastery) and they are ceremonially united and forgiveness is asked for the brotherhood. The day, 11 September, is fixed as the commemoration day for the saints (it is also mentioned in some other later sources with the year 1163, referring to the continuation of the tradition in some form).⁶⁵

In medieval Christianity, in the West and the East alike, the body of a deceased saint was considered to become a *relic*, a token of divine power. Therefore, the concrete presence of a saint's remains was a crucial issue when it came to forming and establishing a cult in a certain place, like a monastery. Sometimes the relics needed to be transferred, so that the saints could bring along their sacred presence and authority to the intended location.⁶⁶ The description of the transfer of Sergei's remains supports Okhotina-Lind's assumption – and mine as well – that the *Skazanie* was

64 «Сказание о Валаамском монастыре», 180–181.

65 «Сказание о Валаамском монастыре», 180–188.

66 See, e.g., PATRICK J. GEARY, *Living with the Dead in the Middle Ages* (Ithaca: Cornell University Press, 1994), 167–193.

written in order to consolidate the founder cult of Sergei and German of Valaam, which, it seems, was still in an embryonic state in the second half of the sixteenth century.

Sergei and German of Valaam were not amongst the dozens of Rus(s)ian saints who were officially venerated in Metropolitan Makarii's ecclesiastical councils in 1547 or 1549 in order to support the development of the specifically Muscovite/Russian Orthodox Church. However, Aleksander of Svir and Savvati of Solovki, both of whom, according to their hagiographies, had lived in Valaam prior to founding their own monasteries, were included in the list (their stay in Valaam was also mentioned in the *Skazanie*).⁶⁷ The story of Sergei's posthumous return to Valaam may refer to an attempt to create a textual basis for – at least – local veneration of the founders. It includes typical elements of a hagiographical text, such as the saint's own "will" to be transferred, and uncorrupted bodies. In the *Skazanie*, Sergei and German are called *prepodobnye* (*prepodobnyi* literally meaning "the most like," referring to an extremely pious life), which is a saintly category for monks, hermits and ascetics.⁶⁸ There are also three miracles listed at the end of the text, which are attributed to the saints (but they are "just a small drop of the whole enormous, incomprehensible multitude of their miracles," the author reminds us).⁶⁹

The reason for the surprisingly late development of the founder cult – despite the fact that Valaam was a well-established monastery in the sixteenth century – may well have been the complicated circumstances of the foundation. Efrem was, allegedly, the first founder of a monastic settlement in Valaam, but he soon left to found another monastery (he was also venerated as the founder saint of Perekomsk in 1549, so could not be "used" in the context of Valaam). The inner dissension during Valaam's

67 «Сказание о Валаамском монастыре», 176–177.

68 See, e. g., GAIL LENHOFF, "Medieval Russian Saints' Lives in Socio-Cultural Perspective", *Russian Literature XXXIX* (1996): 210–215.

69 The first miracle in the *Skazanie* is about the healing of a local fisherman's hand and the vision of Sergei and German related to it (the author says that he heard about the event from the person himself). The second miracle story narrates a case in which Sergei and German protected a spot where there used to be a church from being used for building a new cell. The third one is about yet another crisis in the monastery, when Hegumen Kiril – encouraged by the Devil – presented false accusations against the monks of Valaam and wanted to bring dozens of them to be tried in the court in Novgorod. One of the elders had a vision of German rising from his grave and going to Novgorod to Sergei (whose remains had not yet been transferred to Valaam) in order to help the monks. All the accusations were dismissed by the archbishop and boyars («Сказание о Валаамском монастыре», 188–190).

early existence forced the next potential founder figure, Sergei, to leave the monastery for good. His successor German, on the other hand, could not be presented as an “original” founder. In this light, the pairing of the two saints, Sergei and German, would have been a convenient solution for the apparent problem. In addition, the entity of two saints may have had a symbolic dimension, as the transfer of Sergei’s remains and uniting them with those of German smoothed over the previous discord (as the author of the *Skazanie* pointed out). There were also well-known examples of the pairing of saints in the Eastern Christian tradition, the case of Zosima and Savvatii of Solovki being the closest one to Valaam (in several ways).⁷⁰

In the second section of this chapter we noted that the foundation of monasteries in peripheral areas was not based only on spiritual motives, but it was supported by secular power structures, aiming to consolidate their weak control of remote areas. The description in the *Skazanie* of the transfer of Sergei’s relics to Valaam refers to the author’s strong interest in emphasizing the relationship between Valaam and the central power in the sixteenth century, reflected in the depiction of the bureaucratic process preceding the transfer. There are no documents supporting the chain of events described in the text, including the involvement of the tsar himself, but it is entirely possible that the ruling elite of Moscow actually considered Valaam a noteworthy presence in the remote borderland area. Not only was it a politically contested region, but the local population’s pagan habits and weak commitment to Orthodoxy worried eminent churchmen in the sixteenth century (and continued to do so during the upcoming centuries). One of those churchmen was Makarii himself, who was the archbishop of Novgorod prior to being elected metropolitan of Moscow in 1542, and thus came to know the challenges and opportunities of the Karelian region personally.⁷¹ As the founders of Svir and Solovki monasteries had already been officially venerated, it may have been seen as a beneficial move to support the establishment of the founder cult of Valaam as well.

However, as the monastery faced turbulent times only a few decades after the production of the *Skazanie*, escalating into complete abandon-

70 DONALD WARD, “The Divine Twins: An Indo-European Myth in Germanic Tradition”, *Folklore Studies*, 19 (1968): 14–29. PETER BROWN, *Cult of the Saints* (Bungay: Richard Clay (The Chaucer Press) Ltd., 1983), 97.

71 *Материалы по истории Карелии XII–XVI в.в.*, ред. В. Г. ГЕИМАН (Петрозаводск: Государственное издательство карело-финской ССР, 1941), n:o 52, 127–131. *Материалы по истории Карелии XII–XVI в.в.*, n:o 64, 154–159. LIND, “Politico-religious landscape of medieval Karelia”, 9. KORPELA, *The World of Ladoga*, 47–49.

ment for a full century, the potential development of the founder cult was halted. As noted at the beginning of this study, by the time of the refoundation of the monastery at the beginning of eighteenth century, only random bits of information had been preserved concerning the early phases and founders of Valaam, and the foundation for the veneration – as well as the narrative of the monastery’s early phases – had to be compiled and even invented to match its growing prestige using very heterogeneous material.

CONCLUSION

Even though *Skazanie o Valaamskom monastyre* refers to the foundation and early phases of Valaam monastery at the turn of the fifteenth century, it is a text produced in the 1550-1570s, and events and developments of that period obviously form its main context. The decades of Ivan IV’s reign from the 1540s onwards were marked by assiduous consolidation of central Muscovite power, secular as well as ecclesiastical. The *Skazanie*, for its part, fits into this development well.

In the sixteenth century Valaam was a well-established monastery which, however, seems to have lacked a proper founder cult. As the number of “domestic” saints was growing remarkably, this deficiency may have looked more and more glaring. But as the question of the actual founder(s) was so complicated – here we must presume the unknown author of the *Skazanie* was referring to the best contemporary knowledge of the issue – a conventional hagiographic text was probably more or less out of question. Whoever the author was, he seems to have met the challenge with a text in the form of a “tale,” in which gaps are filled and awkward events worked around to form a coherent narrative, convincing enough to be used as a basis for at least local veneration of the pair of Valaam’s founder saints. In this context, it is of secondary importance whether the text was widely distributed or not; it is even more likely it was not, as it was written only a few decades before the politically and militarily turbulent Time of Troubles and the abandonment of the monastery, which put a stop to the development of the religious community.

While the *Skazanie* reflects the central power’s contemporary need to consolidate the Muscovite/Russian Orthodox culture internally as well as to control the peripheral areas (especially borderland regions) more effectively, it also offers an interesting peephole into the history and life of a medieval northern island monastery as it was represented in the latter

half of the sixteenth century. The issues briefly examined in this chapter – the non-stereotypical, surprisingly realistic sections depicting external and internal problems with their solutions, and the relatively strict monastic rule – shed some light on the real and potential challenges a remote and isolated monastic community was likely to face.

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