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The Unity of *Normanitas*: Norman Identity in Twelfth-Century Scotland and Southern Italy

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THE UNITY OF *NORMANITAS*: NORMAN IDENTITY
IN TWELFTH-CENTURY SCOTLAND AND SOUTHERN ITALY

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ABSTRACT

Scholars have rigorously debated the extent to which the Normans remained a definitively identifiable group as they branched out from Normandy in endeavors of conquest and expansion. In the twentieth century, historians such as Charles Homer Haskins and David Douglas maintained the unity of Norman identity throughout the British Isles, southern Italy, and the crusader states. Other scholars like R. H. C. Davis argued that the Normans were merely extraordinary cultural assimilators and decried the notion of Norman unity, or *Normanitas*, as a myth propagated by chroniclers and historians dating back to the tenth century. Drawing upon recent scholarship, this thesis challenges the stark dichotomy of Norman unity/disunity posited by twentieth century historians. With the Norman identity debate in mind, this thesis yields a comparative examination of Norman identity, influence, and institutions in Scotland and southern Italy during the *longue durée* of the twelfth century. Through analyses of Norman martial identity and influence, administrative governance and state-making, and ethnicity and kinship, this thesis demonstrates how Norman identity, influence, and institutions were simultaneously evident and evolving in the peripheral areas of Europe, which Keith Stringer has styled the 'Norman Edge.' Thus, this analysis underscores that, although Norman identity indeed waned over time, *Normanitas* remained palpable on the peripheries of Europe until the final quarter of the twelfth century.

DEDICATION

For Brigadier General Joel W. Seymour,

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TABLE OF CONTENTS

INTRODUCTION

In August 1138 an army led by David I, king of Scots, fought an English host near

Northallerton in northern England. Contemporary accounts of the clash described how

the English army rallied around a wagon-mounted mast bearing various religious

banners, lending the encounter its name: the Battle of the Standard. Chroniclers of the

battle attributed pre-combat speeches to the leaders of the assembled armies. One such

example is Henry of Huntingdon's description of Bishop Ralph of the Orkneys' homily

to the English:

> Noblemen of England, renowned sons of Normandy, before you go into
> battle you should call to mind your reputation and origin: consider well
> who you are and against whom and where you are fighting this battle. For
> no one has resisted you with impunity. Bold France, when she had put you
> to the test, melted away. Fruitful England fell to your conquest. Wealthy
> Apulia, gaining you, renewed herself. Jerusalem, the celebrated, and
> famous Antioch both submitted to you. Now, however, Scotland, which is
> rightly subjected to you, attempts to thrust you back, preferring unarmed
> rashness, more fitting for brawl than battle.[1]

The speech is undoubtedly a literary invention of the chronicler; however, the content of

the constructed oration offers a glimpse into the ambiguity of contemporary views of

Norman identity in the twelfth century. Henry of Huntingdon—through Bishop Ralph—

at once conflated the English and the Normans and recalled a legacy of exceptional

Norman military achievements, including conquests in England, southern Italy, and the

Holy Land. The message was that a brash Scottish army would next experience the

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[1] Henry of Huntingdon, *The History of the English People, 1000-1154*, trans. Diana
Greenway (Oxford: Oxford University Press, 2002), IV.8, 71.

realities of an English army possessing the martial spirit of their Norman ancestors. Yet, Henry of Huntingdon's characterization of Norman identity is complicated because the Scottish army also included Norman knights, vassals of David I who had acquired land in southeastern Scotland beginning in 1124 by invitation of the king of Scots himself.

The ambiguous and complex web of identity in Henry of Huntingdon's account of the Battle of the Standard evokes several questions: What qualities or institutions constituted 'Normanness' in the twelfth century? Was a collective and distinct sense of Norman identity, or *Normanitas*, shared by men of Norman descent throughout Normandy, Britain, southern Italy, and the Holy Land?[2] How did Norman expansion on the peripheries of Europe affect Norman identity? How did contemporary chroniclers, Norman and non-Norman, understand and manifest *Normanitas*? And lastly, what was the fate of Norman identity over time? This study of *Normanitas* in Scotland and southern Italy endeavors to explore these questions to build on and challenge previous historical arguments for and against a separate and distinct Norman identity in the twelfth century.

The Normans represent a fundamental force in the history of the high Middle Ages. Yet, due to the geographic expansiveness of their military and political exploits, scholars have long struggled to definitively grasp the nature of Norman identity. In 911 the Frankish king Charles the Bald formally granted the region of Neustria in northeastern Francia to a group of Scandinavian invaders led by a Viking named Rollo.

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[2] Andrew Jotischky and Keith Stringer, ed., *Norman Expansion: Connections Continuities and Contrasts* (London: Routledge, 2020), 2.

In return, Rollo and his men agreed to protect Francia from further Viking incursions and to convert to Christianity. The Scandinavian settlers swiftly began adopting Frankish culture while retaining their Scandinavian propensity for martial might. Frankish contemporaries in the tenth century referred generally to all Scandinavian invaders as *Normanni*, or 'Northmen.' By the end of the tenth century, however, the vague term *Normanni* transformed into a specific ethnonym for the 'Normans,' or the Scandinavian-Frankish descendants of Rollo and his men. Writing in the twelfth century, the Anglo-Norman chronicler Orderic Vitalis explained the Norman ethnonym accordingly:

> The mighty leader Rollo, with the Normans, was of this race; and they first conquered Neustria which is now called Normandy after the Normans. For in the English language 'aquilo' means 'north' and 'homo', 'man'; Norman therefore means 'man of the north', and his bold roughness has proved as deadly to his softer neighbours as the bitter north wind to young flowers.[3]

Furthermore, in his characteristically critical style, Orderic Vitalis asserted that the Normans were distinct from their Frankish neighbors and other peoples they encountered:

> The Normans are an untamed race, and unless they are held in check by a firm ruler that are all too ready to do wrong. In all communities, wherever they may be, they strive to rule and often become enemies to truth and loyalty through the ardour of their ambition. This the French and Bretons and Flemings and their other neighbours have frequently experienced; this the Italians and Lombards and Anglo-Saxons have suffered to the point of destruction.[4]

Indeed, throughout the eleventh and twelfth centuries Normans departed from Normandy and were prolific warriors in southern Italy, Britain, Spain, and the Holy Land. Norman

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[3] Orderic Vitalis, *The Ecclesiastical History of Orderic Vitalis*, vol. V, trans. Marjorie Chibnall (Oxford: Oxford University Press, 1969), 25-27.
[4] Orderic Vitalis, *Ecclesiastical History*, vol. V, trans. Chibnall, 25.

aristocrats attained royal power and established Norman kingdoms, most notably in England, Antioch, and Sicily. Thus, by the early years of the twelfth century Norman influence was established from Scotland to Sicily and from Cardiff to Antioch.

The view of a collective Norman history was first introduced by Charles Homer Haskins in his landmark 1915 work, *The Normans in European History*. Haskins produced a "connected account" of Norman history, synthesizing the "Norman achievement in France, in England, and in Italy" into a united narrative.[5] Thus, he depicted the Normans as a monolithic group regardless of specific place and time. For instance, Haskins noted a commonality in contemporary chronicles of the Normans across geographic zones and throughout the tenth, eleventh, and twelfth centuries:

> Through all these accounts runs the same story of a high-spirited, masterful, unscrupulous race, eager for danger and ready for every adventure, and needing always the bit and bridle rather than the spur.[6]

Haskins' romanticization of the Norman spirit was at no point tempered, and his work sought to equate Norman history with Western European history. Haskins viewed Norman conquerors as empire-builders and Norman kings, particularly Roger II of Sicily, as the creators of the first modern states.[7] The latter was further elucidated in Haskins' subsequent work on Norman institutions, which focused predominantly on Anglo-Norman administration but also referenced similar elements in the governments of

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[5] Charles Homer Haskins, *The Normans in European History* (New York: Frederick Ungar Publishing Co., 1915), vii.
[6] Haskins, *Normans in European History*, 15.
[7] Haskins, *Normans in European History*, 85; 233; see especially Chapter IV, "The Norman Empire," and Chapter VIII, "The Norman Kingdom of Sicily."

twelfth-century Scotland and southern Italy.[8] Most significantly, Haskins' works laid the

foundation for subsequent historiography by presenting the Normans of Normandy,

Britain, and southern Italy as a united people of exceptional achievement and empire.

For the next half-century Haskins' idea of Norman unity was virtually absent

from historical study.[9] In the second half of the twentieth century Haskins' view of

comprehensive Norman achievement was revived. For example, David C. Douglas,

bemoaning the fragmented and geographically particular nature of Norman studies,

sought to convey Norman conquest and colonization as "a vast movement of inter-related

endeavour which should be studied as a unity."[10] Moreover, he wrote, "[a]ll Norman

enterprise…was interconnected."[11] Douglas continued the strand of interconnected and

synthesized Norman achievement in his follow-up work that dealt largely with the

twelfth-century Anglo-Norman and Sicilian kingdoms.[12] Throughout his works, Douglas

did not mark any notable distinctions between Normans in Normandy, Britain, or

southern Italy.

Although the geographic scope of their studies was limited to Britain and

Normandy, R. Allen Brown and John Le Patourel also contributed to the idea of

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[8] Charles Homer Haskins, *Norman Institutions* (New York: Frederick Ungar Publishing Co., 1918), passim.

[9] Evelyn Jamison examined the connections between Normans in southern Italy and England in a 1938 lecture. See: Evelyn Jamison, "The Sicilian Norman Kingdom in the minds of Anglo-Norman contemporaries," in *Proceedings of the British Academy*, vol. 24, 1938, 237-286.

[10] David C. Douglas, *The Norman Achievement, 1050-1100* (Berkeley: University of California Press, 1969), 5.

[11] Douglas, *Norman Achievement*, 11.

[12] David C. Douglas, *The Norman Fate, 1100-1154* (Berkeley: University of California Press, 1976).

integrated Norman history and the unity of the Normans. In the first chapter of his work

on the conquest of England Brown wrote of the Normans:

> New men themselves, Vikings in origin and established in their province
> from 911 by the grant and 'treaty' of St Clair-sur-Epte, they made of
> Normandy in the next one hundred and fifty years one of the most
> powerful states in Latin Christendom and the most potent feudal
> principality in France. Thus established, they conquered the far larger
> kingdom of England in 1066, and in due course rode out from there into
> Wales and southern Scotland, and ultimately into Ireland. Overlapping
> their achievement, and going forward at the same time, was their
> piecemeal conquest of Southern Italy and Sicily…[13]

Here are resounding echoes of Haskins' theme of a single Norman people. Additionally,

Le Patourel asserted that the unified political structure of England and Normandy

constituted a Norman empire.[14]

In the final quarter of the twentieth century the acceptance for Norman unity was

by no means universal. In the same publication year of La Patourel's work on Norman

empire, R. H. C. Davis published an examination of eleventh- and twelfth-century

Norman chroniclers, which marked a stark retreat from the comprehensive claims for the

unity of *Normanitas*. In *The Normans and their Myth* Davis argued that Normans were

not a separate and distinct group but were rather scarcely different than other peoples of

French origin by the eleventh century.[15] The concept of *Normanitas*, he posited, was

merely a historiographical construct propagated by twelfth-century Norman chroniclers,

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[13] R. Allen Brown, *The Normans and the Norman Conquest*, 2nd ed. (Woodbridge: The Boydell Press, 1985), 11.

[14] John Le Patourel, *The Norman Empire* (Oxford: Oxford University Press, 1976).

[15] R. H. C. Davis, *The Normans and their Myth* (London: Thames and Hudson Ltd., 1976), 12.

most notably the Anglo-Norman chronicler Orderic Vitalis.[16] Ultimately, Davis asserted that Norman chroniclers disseminated the "myth" of a collective Norman identity in the twelfth century at a time when Norman people and customs were losing their distinctiveness due to assimilation.[17] The basis for a Norman historiographical myth was further explored by Graham Loud. Whereas Davis ascribed Norman *mythopoeia* to the twelfth century, Loud placed the origins of the Norman myth in the eleventh century at the apogee of conquest.[18]

Despite the arguments for a Norman myth, historical scholarship at the end of the twentieth century and into the twenty-first century generally accepted *Normanitas*.[19] Nevertheless, recent scholarship has provided more nuance regarding the nature of *Normanitas* by acknowledging the complexities and diversities inherent in identity. Of particular relevance to this study was Nick Webber's synthetic work on Norman identity in Normandy, southern Italy, and England from the tenth to twelfth centuries.[20] Webber demonstrated that Norman identity was based on a variety of factors, such as common ancestral origins, shared allegiance to a Norman leader, actual and perceived ties to

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[16] Davis, *Normans and their Myth*, 14.

[17] Davis, *Normans and their Myth*, 14.

[18] G. A. Loud, "The *Gens Normannorum* – Myth or Reality?" reprinted in *Conquerors and Churchmen in Norman Italy* (Aldershot: Ashgate Publishing Limited, 1999), 115.

[19] See David Bates and Anne Currey, ed., *England and Normandy in the Middle Ages* (London: The Hambledon Press, 1994); Marjorie Chibnall, *The Normans* (Oxford: Blackwell Publishers Ltd, 2000); David Bates, *The Normans and Empire: The Ford Lectures delivered in the University of Oxford during Hilary Term 2010* (Oxford: Oxford University Press, 2013).

[20] Nick Webber, *The Evolution of Norman Identity, 911-1154* (Woodbridge: The Boydell Press, 2005).

Normandy, and the belief in an exceptional Norman warrior ethos.[21] Normans crafted

their identity by emphasizing these factors at different times in various locales based on

cultural and political contexts. Thus, *Normanitas* was not static and immutable but fluid

and malleable. Such a nuanced viewpoint abnegates a monolithic view of *Normanitas*

and facilitates comparative analysis of the full gamut of Norman deeds, institutions, and

identity.

Keith Stringer and Andrew Jotischky's conceptual framework of the 'Norman

Edge' is the latest contribution to scholarship investigating the legitimacy of Norman

unity and the extent of Norman identity. Stringer and Jotischky's explanation of their

research project is worth recounting at length:

> The aims of 'The Norman Edge' project were to investigate in a
> collaborative fashion the salient characteristics of Norman expansion on
> the peripheries of Christian Europe, in order to contribute to a
> re-evaluation of the contours and coordinates of the Norman world or
> worlds and, more generally, to assess in novel ways the processes of
> medieval state-making and the construction (or reconstruction) of
> identities. These aims were addressed by focusing on how
> socio-political cultures operated in 'middle Britain' (northern England and
> lowland Scotland), southern Italy and the crusader states.[22]

Thus, the idea of a Norman Edge serves as the foundation for further collective study of

peripheral areas comprising Normans at both the local and transregional level. For this

study the theory of the Norman Edge is particularly beneficial to the examination of

Normanitas because such a model acknowledges the diversity of Norman frontier areas

and polities while synchronously viewing these frontiers in relation to one another and to

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[21] Webber, *Evolution of Norman Identity*, passim.
[22] Jotischky and Stringer, ed., *Norman Expansion*, 1.

the common 'core' of Normandy.[23] The peripheries of Europe, where Normans were vastly outnumbered and thus where the characteristics of Norman identity were perhaps more conspicuous, serve as tremendous focal points for analysis of *Normanitas*. Therefore, the concept of the Norman Edge forms the foundation of this study.

As evidenced by Henry of Huntingdon's illustrative passage and the work of past scholars elucidated above, study of the Normans is fundamentally the study of their chroniclers. Medieval chronicles are contemporary, or near-contemporary, narrative accounts of events, and their content generally encompasses military, political, and ecclesiastical affairs. The expansiveness of Norman conquest and colonization is reflected in the abundance of their chroniclers. The rich contributions of contemporary chroniclers of both Norman and non-Norman provenance provide vital insight into the views and self-perceptions of Norman history and identity. Consequently, this study will prominently feature eleventh- and twelfth-century chronicles such as Aelred of Rievaulx, Amatus of Montecassino, Geoffrey Malaterra, Orderic Vitalis, and numerous others. Nonetheless, as the historian Kenneth Baxter Work has demonstrated, chroniclers were "making history" shaped by their individual biases and perspectives.[24] Therefore, the chronicles must be analyzed critically and evaluated judiciously.

This study occasionally employs other contemporaneous sources, such as royal charters and extant administrative documents, to corroborate the accounts of the

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[23] Keith Stringer, "Prologue: The Norman Edge in context," in *The Normans and the 'Norman Edge:' Peoples, Polities and Identities on the Frontiers of Medieval Europe*, ed. Keith Stringer and Andrew Jotischky (London: Routledge, 2019), 26; passim.
[24] Kenneth Baxter Wolf, *Making History: The Normans and Their Historians in Eleventh-Century Italy* (Philadelphia: University of Pennsylvania Press, 1993), passim.

chroniclers. For example, the charters of David I and his son Henry, Earl of Northumberland, substantiate many of the Scottish king's actions. Prior to the reign of David I, royal documentation is practically nonexistent in Scotland, so these charters, although relatively scant compared to other contemporary royals, are a significant contribution to analysis of Scotland in the first half of the twelfth century. Other royal documentation, such as the compilation of fiefs in southern Italy known as the *Catalogus Baronum*, also provide insight into Norman institutions. Another supplement to this study is the authoritative *People of Medieval Scotland (PoMS)* database, which remarkably contains the names of all people mentioned in over 8,600 extant contemporary Scottish documents.[25]

It is crucial in my examination of *Normanitas* to clearly define and demarcate the Normans of Scotland and southern Italy. Norman conquest and colonization in the eleventh and twelfth centuries invariably comprised diverse Frankish elements, such as Bretons, Flemings, and others. Preeminent scholars have often referred to the entire collective of conquerors and colonizers as 'Normans' out of convenience. For instance, in the first comprehensive study of Normans in Scotland, R. L. Græme Ritchie stated that "the non-Norman element was very strong" and conceded that the term 'Norman' was both generic and conventional.[26] Likewise, G. W. S. Barrow, the foremost twentieth-

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[25] Amanda Beam, John Bradley, Dauvit Broun, John Reuben Davies, Matthew Hammond, Neil Jakeman, Michele Pasin and Alice Taylor (with others), *People of Medieval Scotland: 1093–1371* (Glasgow and London, 2019), www.poms.ac.uk [accessed 15 Mar. 2022].
[26] R. L. Græme Ritchie, *The Normans in Scotland* (Edinburgh: Edinburgh University Press, 1954), xvii-xvii.

century scholar of the 'Anglo-Norman Era' in Scotland, traced the origins of colonizers to their Norman, Breton, and Flemish roots.[27]

The all-encompassing 'Norman' classification, though convenient and reasonable for more comprehensive studies, is not suitably exact for my examination of Norman identity. Thus, in this study I will maintain more inflexible parameters on the definition of who was Norman and what constituted *Normanitas* in Scotland and southern Italy. Throughout this study, only individuals of definite Norman descent will be referred to as Normans. Consequently, while Walter Fitz Alan, the steward (*dapifer*) of David I, is generally considered a characteristic 'Norman' aristocrat of Scotland, for my purposes he was not a Norman but a Breton because his family's continental origin was Dol in Brittany rather than Normandy.[28] Furthermore, when applicable, those of dual English and Norman descent, or those Normans who possessed fiefdoms in England, will be referred to as Anglo-Normans. This is an admittedly imprecise term in some cases but is a term that generally appreciates the multiplicity of Norman ethnic and political allegiances. Setting such rigid and consistent parameters on the definition of Norman and *Normanitas* serves two fundamental purposes. First, by unambiguously delineating who was Norman, I will more clearly assess the distinctiveness of Norman identity. Second, by maintaining consistent parameters, I will better examine the changes to Norman identity over time.

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[27] G. W. S. Barrow, *The Anglo-Norman Era in Scottish History* (Oxford: Oxford University Press, 1980), passim.
[28] Barrow, *Anglo-Norman Era*, 13-14.

The myriad manifestations of identity range from the concrete to the abstract, the physical to the intangible. Accordingly, this study seeks to analyze *Normanitas* from a variety of perspectives. The first chapter of this work focuses on Norman martial prowess as a significant facet of Norman identity in Scotland and southern Italy. It demonstrates that in the eleventh and twelfth centuries Norman identity was derived first and foremost from their martial prowess. As vassals of David I in Scotland and as conquerors of southern Italy and Sicily, the warrior ethos was fundamental to 'being Norman.' Thus, the Norman professional military elites who carved out swathes of land in the *Mezzogiorno* or served as knights and military advisors to Scottish kings were distinguished from other groups of people. Furthermore, this first chapter will analyze the tangible Norman influence on feudal military practices in Scotland and southern Italy. The second chapter analyzes Norman identity from the standpoint of institutions and the rise of administrative government. Normans in Scotland and southern Italy introduced administrative offices such as the justiciar and the chamberlain, which had their origins in Normandy or the Anglo-Norman kingdom. Thus, this chapter will assess the extent to which Normans on the peripheries of Europe contributed to state-making and whether shared institutions constitute *Normanitas*. The third and final chapter of this study will examine Norman identity from the abstract perspective of ethnicity. Medieval ethnicity was not monolithic. Ethnic identity was defined by culture and was accordingly complex and malleable. The third chapter will analyze the concurrent diminution and tenacity of ethnic identity in the *gens Normannorum* in Scotland and southern Italy in the eleventh and twelfth centuries.

Ultimately, by judiciously viewing *Normanitas* through what David Bates characterized as a "continuum of identity and self-identity," it becomes evident that a separate and distinct Norman identity was indeed manifest to varying degrees in southeastern Scotland and southern Italy, two disparate zones of the Norman Edge, until the final quarter of the twelfth century.[29] Such a conclusion is crucial in determining the viability of twentieth-century arguments for Norman achievement, empire, myth, and unity.

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[29] Bates, "The Rise and Fall of Normandy, c. 911-1204," in *England and Normandy*, 20.

CHAPTER I
NORMAN MARTIAL IDENTITY ON THE NORMAN EDGE

Departing from their ancestral home in Normandy, in the eleventh and twelfth centuries

Normans gained hegemony in areas of Britain, southern Italy, and the Holy Land. Despite

the territorial expansiveness of the Norman footprint and the heterogeneity of these

regions, their exceptional warrior ethos and feudal military practices constitute

Normanitas. The purpose of this chapter is to identify elements of Norman martial

identity and influence in southern Italy and Scotland, two distinct zones of the Norman

Edge. In southern Italy, the Norman warrior ethos is wholly manifest in the conquests of

the *Mezzogiorno* and Sicily. Although the Norman kings of Sicily incorporated existing

local frameworks into their system of military obligation, there is evidence of Norman

feudal influence after the founding of the twelfth-century Norman kingdom. Similarly,

the martial elements of *Normanitas* were prevalent in twelfth-century Scotland among

imported Norman and Anglo-Norman barons, who, while not conquerors in the literal

sense, were first and foremost members of a military elite. Furthermore, like the Norman

kingdom of Sicily, Scotland experienced a process of military feudalization. Thus,

Normans on opposite peripheries of Europe shared fundamental elements of *Normanitas*,

which was manifested in the Norman warrior ethos and feudal military institutions.

Norman Warriors

As one popular historian of the Normans in southern Italy and Sicily evocatively noted,

"the great cauldron of South Italy was never altogether off the boil."[1] Before the arrival

of the Normans in the first quarter of the eleventh century, southern Italy and Sicily were

a cultural and political mosaic comprised of ever-shifting local power dynamics. On the

peninsula, the major power brokers were the Byzantine Empire, rival Lombard

principalities, and the papacy. The Byzantine Empire dominated the southern Italian

mainland in the first half of the eleventh century, and its primary centers of power were

the wealthy city-states of Amalfi, Gaeta, and Naples. The Lombard princes of Capua and

Salerno, located in the region known as the Campania, shifted allegiance in a revolving

competition for supremacy. From his seat in Rome, the pope also sought to exert his

influence in southern Italy. The pope vied for power with his Byzantine and Lombard

neighbors, and he also competed with his temporal counterparts, the German emperors,

who strived for control over the territory once acquired by their ancestor, Charlemagne.

Off the mainland, Muslims governed and populated Sicily, staved off Byzantine efforts to

gain territory on the island, and conducted maritime trade with polities on the mainland.[2]

Contemporary chroniclers offer contrasting explanations for the origin of the

Normans in the Mediterranean. For example, in his eleventh-century *History of the

Normans*, a southern Italian monk named Amatus of Montecassino suggested that forty

Norman pilgrims returning from the Holy Land saved the inhabitants of Salerno from

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[1] John Julius Norwich, *The Normans in the South, 1016-1130* (London: Faber & Faber Limited, 1967), 21.
[2] Gordon S. Brown, *The Norman Conquest of Southern Italy and Sicily* (Jefferson: McFarland & Company, Inc., Publishers, 2003), 10-11.

Muslim raiders. After returning to Normandy with gifts and rewards from the Salernitans, the Norman pilgrims spread the promise of plunder and prestige that awaited those willing to settle in southern Italy.[3] Another contemporary author, William of Apulia, asserted that in 1016 Norman pilgrims visiting the shrine of Michael the Archangel at Monte Gargano encountered a Lombard dissident named Melus. Melus convinced the Normans to assist him in an attack on the local Byzantine lords. According to William of Apulia, the Normans recognized the opportunity for glory and plunder and continued operating as mercenaries throughout southern Italy.[4]

Outside of chronicles and conjecture, Norman mercenaries were definitively present in southern Italy in the 1010s, offering their martial services to the various powers in the region. As Norman martial prowess gained the attention of local lords, Norman mercenaries were increasingly commissioned and rewarded for their military services. In 1030, the king of Naples rewarded Rainulf Drengot by investing him as the count of Aversa.[5] This first Norman lordship in the *Mezzogiorno* sparked further Norman interest in the Mediterranean, and the number of sons from Normandy seeking recognition and riches increased. Over the course of the next several decades, Normans operated as hired soldiers for virtually every regional power on the Italian mainland,

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[3] Amatus of Montecassino, *The History of the Normans*, trans. Prescott N. Dunbar (Woodbridge: The Boydell Press, 2004), I.17-I.19, p. 49-50.
[4] William of Apulia, *The Deeds of Robert Guiscard*, trans. G. A. Loud, https://ims.leeds.ac.uk/wp-content/uploads/sites/29/2019/02/William-of-Apulia.pdf, [accessed 18 Mar. 2022].
[5] Emily A. Winkler and Andrew Small, "Introduction," in *The Normans in the Mediterranean*, ed. Emily A. Winkler and Liam Fitzgerald (Turnhout: Brepols Publishers n.v., 2021), 18.

alternating their allegiance among the various Lombard lords and participating in the Byzantine invasion of Sicily in 1038. Although their actions are best characterized as independent plundering and pillaging, by 1043 the Normans had accrued enough collective power to seize control of the central city of Melfi and establish twelve Norman-controlled counties in Apulia.[6] The opportunistic mercenaries were becoming fixed, autonomous authorities.

The final barrier to Norman power on the mainland was an alliance of the Byzantines, Lombards, and the papacy (along with German infantry) in 1053. A unified Norman army devastated the alliance at the Battle of Civitate, captured Pope Leo IX, and cemented independent Norman power on the Italian mainland. The remainder of the eleventh century saw continued Norman conquest as members of the Hauteville and Drengot families carved out large swaths of territory as the vassals of Pope Nicholas II. For example, Robert Guiscard conquered Calabria, and his brother, Roger, seized the island of Sicily over the course of three decades. Richard Drengot attained and solidified control of the principality of Capua.[7] These eleventh-century conquests ultimately culminated in Roger II's foundation of the Norman kingdom of Sicily in 1130.

The various members of the Hauteville and Drengot families largely operated autonomously, and the rather haphazard conquests of southern Italy and Sicily cannot be entirely viewed as the result of a unified strategy. Even after the advent of the Norman kingdom of Sicily in 1130, internecine civil wars involving the monarchy and self-

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[6] Winkler and Small, "Introduction," 20.
[7] Winkler and Small, "Introduction," 21.

determined lords were rife in the *Mezzogiorno*. Nevertheless, the Normans in southern

Italy and Sicily possessed a unified *Normanitas*, evident in their shared martial prowess

and military institutions, resulting in an exclusive "Norman military community."[8]

The chroniclers of southern Italy repeatedly glorify the martial spirit of the

Norman conquerors. Some scholars accuse the chroniclers of merely perpetuating a

"myth" of *Normanitas*; however, when one contextualizes their overt paeans within a

critical assessment of conclusive Norman triumphs, the admittedly biased accounts of

Norman chroniclers shed authentic insight into the nature of Norman martial identity.[9] In

other words, while the Norman chroniclers employed a calculatedly panegyric

"vocabulary of conquest," the military exploits of the Normans in southern Italy and

Sicily substantiate such laudatory characterizations.[10]

In the most comprehensive account of the Norman conquests of southern Italy and

Sicily, Geoffrey Malaterra provided abundant depictions of the Norman warrior ethos.

The chronicler described how the Normans were exceptionally distinguished by their

"*strenuitas*," which is variably translated as "courage," "dynamism," and "valour."[11] One

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[8] Matthew Bennett, "Norman Conquests: Nature, Nurture, *Normanitas*," in *The Normans in the Mediterranean*, ed. Emily A. Winkler and Liam Fitzgerald (Turnhout: Brepols Publishers n.v., 2021), 57.
[9] For further discussion of the "Norman myth," see R. H. C. Davies, *The Normans and their Myth* (London: Thames and Hudson Ltd, 1976); G. A. Loud, "The *Gens Normannorum* – Myth or Reality?" reprinted in *Conquerors and Churchmen in Norman Italy* (Aldershot: Ashgate Publishing Limited, 1999); Emily Albu, *The Normans in their Histories: Propaganda, Myth, and Subversion* (Woodbridge: Boydell & Brewer, 2001); Bennett, "Nature, Nurture, *Normanitas*,", 43-66.
[10] Bennett, "Norman Conquests: Nature, Nurture, *Normanitas*," 61.
[11] Geoffrey Malaterra, *The Deeds of Count Roger of Calabria and Sicily and of His Brother Duke Robert Guiscard*, trans. Kenneth Baxter Wolf (Ann Arbor: The University of Michigan Press, 2005), passim.

scholar suggests that an overarching definition of *strenuitas* is "a form of violent energy which made [the Normans] irresistible in battle."[12] Geoffrey Malaterra described how the sons of Tancred de Hauteville, such as Robert Guiscard and Count Roger, from a young age "began to apply themselves to military training and to horses and arms, learning to defend themselves and to do battle against an enemy."[13] He also asserted that Count Roger, the conqueror of Sicily, "exhibited the ferocity of a lion in every struggle."[14] Examples of Norman martial vigor are not limited to the renowned members of the Hauteville and Drengot families. Geoffrey Malaterra provides a striking anecdote about the pre-battle antics of a Norman named Hugh Tudebus:

> [The Greeks] sent an envoy and ordered the [Norman] garrison to make a choice: either yield to them peacefully and retreat from the region unharmed or fight with them the very next day. The envoy whom the Greeks sent was sitting on a very beautiful horse when a certain Norman by the name of Hugh—with the cognomen Tudebus—began to stroke the horse and then suddenly struck it on the neck with his bare fist, knocking it senseless to the ground with a single blow. This deed—which terrified the Greeks when it was later reported to them—was considered by Hugh and his compatriots to be a marvelous thing.[15]

This extraordinary example of bravado and intimidation, although undoubtedly more literary than representative of an actual feat, exemplifies Norman idealization of *strenuitas*. The chroniclers of the Norman conquest of southern Italy illustrate that a fundamental component of Norman identity in southern Italy was the martial might of the conquerors.

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[12] Bennett, "Norman Conquests: Nature, Nurture, *Normanitas*," 54.
[13] Geoffrey Malaterra, *Deeds of Count Roger*, trans. Wolf, 1.4, p. 53-54.
[14] Geoffrey Malaterra, *Deeds of Count Roger*, trans. Wolf, 2.43, p. 121.
[15] Geoffrey Malaterra, *Deeds of Count Roger*, trans. Wolf, 1.9, p. 57.

Whereas the conquests of southern Italy and Sicily were definitively marked by the trademark militarism inherent in Norman expansion, Normans did not establish themselves in Scotland through conquest. In the first academic work wholly devoted to the Normans in Scotland, R. L. Græme Ritchie asserted that a "Norman Conquest" took place in Scotland.[16] Ritchie clarified that Scotland was "'conquered'…by a scart of the pen," not by a Norman military conquest.[17] Still, Ritchie's use of the terms 'conquest' and 'conquerors' is problematic in the case of the Normans in twelfth-century Scotland.[18] The advent of Normans in Scotland was an outgrowth of a decades-long process of increasing familial and feudal relations between Scotland's royal family and the Anglo-Norman kings. Therefore, Normans in Scotland were invited colonizers rather than violent subjugators. Nevertheless, Normans in Scotland retained their exceptional warrior ethos and were noticeably distinct from the native Scots due to their martial prowess. In Scotland, enfeoffed Norman nobles were first and foremost knights and military assets, and as a result, patently Norman feudal military influences gradually gained a foothold in twelfth-century Scotland.

The process that led to the advent of the Normans in Scotland began in the decades following the Norman conquest of England. After 1066, neither William the Conqueror nor his son William Rufus were entirely capable of pacifying their territory in northern England. Máel Coluim, descendant of the Scottish Canmore kings, was a

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[16] R. L. Græme Ritchie, *The Normans in Scotland* (Ediburgh: The Edinburgh University Press, 1954, xi.

[17] Ritchie, *Normans in Scotland*, 190.

[18] Despite stating that Scotland was not conquered militarily by the Normans, Ritchie's work includes a dubiously entitled chapter, "David the Conqueror."

northern aggressor and the northern barons of William the Conqueror and William Rufus were largely territorial defenders along the Anglo-Scottish border.[19] Notwithstanding the Conqueror's infamous 'harrying of the North' in 1069 and his invasion of Scotland in 1072 (during which he merely reached Abernethy, roughly 25 miles into the Scottish heartland), the conflict between Scotland and England consisted chiefly of intermittent incursions by Scottish forces.[20] Máel Coluim's primary aim in northern England was the annexation of Northumberland, but his efforts amounted to little more than spasmodic raids.

Despite frequent skirmishes between Scotland and England in the second half of the eleventh century, non-adversarial links between Scotland and Normans began to form. For example, at the Abernethy peace settlement between William the Conqueror and Máel Coluim, the Scottish king paid homage to the Conqueror and supplied the eldest son from his first marriage, Donnchad, as a hostage. Consequently, from 1072 onward Donnchad was effectively an Anglo-Norman nobleman, who indeed acquired knightly status in England.[21] Significantly, Donnchad would not be the only son of Máel Coluim to spend his formative years in the Anglo-Norman court.

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[19] Consistent with other scholars such as Duncan and Grant, I use the Gaelic name forms for Scottish kings up to 1097 and English name forms for subsequent Scottish kings. For example, I employ the name 'Máel Coluim' instead of 'Malcolm III' while consistently referring to his son as 'David I.'

[20] Alexander Grant, "At the Northern Edge: Alba and its Normans," in *Norman Expansion: Connections, Continuities, and Contrasts*, ed. Keith J. Stringer and Andrew Jotischky (London: Routledge, 2013), 50n.5.

[21] Richard Oram, *David I: The King Who Made Scotland* (Gloucestershire: The History Press, 2021), 42.

Upon Máel Coluim's death during a raid in 1093, Scotland experienced an explosive succession crisis, the implications of which directly led to the later surge of Norman influence in Scotland. In addition to the death of Máel Coluim, the late-king's designated heir, Edward, died of wounds sustained during the ill-fated raid, creating an opportunity for Domnall Bán, brother of the slain king, to succeed the throne with the backing of leading Gaelic magnates. To deter threats to the throne, Domnall Bán promptly banished his English subjects along with the surviving sons of Máel Coluim from his second marriage to Margaret of the royal house of Wessex. Thus, along with the English, the sons of Máel Coluim, including Edgar, Alexander, and David, fled to England where they, not unlike their half-brother Donnchad, were inculcated in the Anglo-Norman court.

William Rufus seized the chance to defuse the threat in the north by supporting Donnchad's claim to the Scottish throne, which he seized from Domnall Bán in 1094 with the assistance of an Anglo-Norman army; however, Domnall Bán swiftly reclaimed the Scottish kingship. Domnall Bán lost the throne outright in 1097, once more at the hands of an Anglo-Norman force, and Edgar, the half-English son of Máel Coluim and Margaret, became king of Scotland. After 1100, the bond between the sons of Máel Coluim and the Anglo-Normans increased further during the reign of Henry I, who, upon ascending the throne of England, married the sister of the Scottish king. Thus, Edgar, who ruled from 1097 to 1107, and his successors, his brothers Alexander I and David I, were the brothers-in-law of the Anglo-Norman king. Furthermore, having sought the refuge of England during the Scottish succession crisis and having been raised essentially

as Anglo-Norman nobility, the reigning sons of Máel Coluim culturally identified more with the customs and identity of the Anglo-Normans than with the Gaelic Scots of their homeland. Finally, the relationship between David, the son of Máel Coluim, and Henry I became cemented through feudal bonds. In 1113, Henry I granted David the marriage of Matilda de Senlis, making the future king of the Scots also the Earl of Huntingdon and Northampton and one of the English king's most powerful vassals in England.

Due to the cultural, familial, and feudal bonds between David I and the Anglo-Normans, a military 'Norman conquest' uniquely did not precede Norman influence in Scotland. Rather, David I embarked on "a policy of deliberately invited immigration," in which Norman and Anglo-Norman knights were enfeoffed in southeastern Scotland as vassals to the Scottish king.[22] David I's Norman knights were distinguished by their exceptional martial prowess similarly to Normans in southern Italy.

The martial differences between Normans and native Scots was highlighted at the Battle of the Standard. Having declared support for his niece, Matilda, in her bid for the English throne against Stephen of Blois, David I invaded northern England in 1138. Like his father, David I was also motivated by the desire to annex Northumberland. In August 1138 the invasion campaign culminated in the Battle of the Standard. David I's host was a diverse, amalgamated force, "markedly hybrid in both racial and military terms."[23] The

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[22] Robert Bartlett, *The Making of Europe: Conquest, Colonization and Cultural Change 950-1350* (Princeton: Princeton University Press, 1993), 78.
[23] Matthew Strickland, "Securing the North: Invasion and the Strategy of Defence in Twelfth-Century Anglo-Scottish Warfare," in *Anglo-Norman Warfare: Studies in Late Anglo-Saxon and Anglo-Norman Military Organization and Warfare*, ed. Matthew Strickland (Woodbridge: The Boydell Press, 1992), 222.

army consisted of essentially two sections: an Anglo-Norman element comprising David I's imported barons and a levy of Scots, which encompassed several native factions. The practical military distinctions between David I's Anglo-Normans and the native Scots were obvious. The Anglo-Norman members of David I's army were armored knights, a highly trained host of heavy cavalry capable of swift and brutal offensive maneuvers. Conversely, Henry of Huntingdon characterized the native Scottish contingent, consisting entirely of light infantry, as conspicuously "unarmed and naked"[24] The Scots were armed with spears and cowhide shields, crude defense against the heavy cavalry and archers of the opposing English army.[25] Physically and operationally, the Anglo-Norman vassals of David I bore more resemblance to their counterparts in the English army than to their Scottish allies.[26]

Chronicles of the Battle of the Standard include invented pre-battle speeches that explicitly extol the Norman warrior ethos and tacitly highlight similarities between the Anglo-Norman knights in both the English and Scottish armies. While these speeches are undoubtedly manufactured by the chroniclers, they reveal contemporary views on the martial identity of twelfth-century Normans. For example, Aelred of Rievaulx attributed a speech to Walter Espec, reminding the English army of their Norman military heritage. Prior to the battle, Aelred of Rievaulx describes Walter Espec asking the English army:

> Why should we despair of victory when victory has been given our people by the Most High as if it were our due? Did not our ancestors invade the largest part of Gaul with few soldiers and erase its very name along with

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[24] Henry of Huntingdon, *The History of the English People, 1000-1154*, trans. Diana Greenway (Oxford: Oxford University Press, 2002), IV.8, 71.
[25] Bartlett, *Making of Europe*, 81.
[26] Bartlett, *Making of Europe*, 81.

> the people? How many times did they scatter the army of the Franks? […]
> Indeed we and our fathers in a short time mastered this island, […] in a
> short time we have subjected it to our laws and made it obedient to us.
> […] Who subdued Apulia, Sicily, Calabria if not your Normans?[27]

Clearly, the chronicler wished to illustrate that Norman martial identity was evident among the English host.

Nonetheless, the Norman and Anglo-Norman knights of David I's Scottish army were also reminded of their shared military heritage. After choosing to honor his initial English vassalage over that granted to him by David I, Robert de Brus aligned himself with the English army. Aelred of Rievaulx's chronicle included a speech by Robert de Brus to David I in which he lamented David I's invasion and apparent reliance on the counsel of native Scots. Speaking to David I, Robert de Brus states:

> Against whom are you raising arms today and leading this immense army?
> Surely against the English and the Normans! O King, have you not always
> found their counsel useful, their aid ready, and their allegiance welcome?
> Therefore I ask you, my lord, have you found such fidelity in the Scots
> that you can safely dismiss the counsel of the English for yourself and
> your people and deprive yourself of the aid of the Normans […]?[28]

Although this invented speech does not explicitly acknowledge the presence of David I's own Anglo-Norman contingent, both the English and Scottish armies were in fact "controlled by Norman knights."[29] David I and his Anglo-Norman advisers planned to assemble in the vanguard "as many armed knights and archers as there were…, so that as far as possible knights should contend with knights and archers oppose archers."[30] The

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[27] Aelred of Rievaulx, *Aelred of Rievaulx: The Historical Works*, trans. Jane Patricia Freeland (Kalamazoo: Cistercian Publications, 2005), 252-253.
[28] Aelred of Rievaulx, *The Historical Works*, trans. Freeland, 261-262.
[29] Bradbury, "Battles in England and Normandy," 191.
[30] Aelred of Rievaulx, *The Historical Works*, trans. Freeland, 257.

native men of Galloway, though, believed that their position in the Scottish vanguard was theirs by right, leading to disputes among David I's Anglo-Norman knights and the native Scots. Ultimately, to avoid defections and further internal hostility, David I accepted the Galwegian right to comprise the vanguard, a decision that resulted in disastrous consequences for the Scottish army.[31] The men of Galloway mounted an "aggressive but ill-disciplined advance," and their lack of adequate armor resulted in heavy losses and eventual Scottish retreat.[32] Indeed, Aelred of Rievaulx characterizes the members of the Galwegian vanguard as "stuck all around by arrows like the spines of a hedgehog."[33]

Despite the disaster of the Scottish advance, the accounts of Henry of Huntingdon and Aelred of Rievaulx extol the Anglo-Norman contingent of the Scottish army. After describing the disastrous advance of the Galwegians, Henry of Huntingdon recounts that David I's "valiant son," Henry, and his line of mounted Norman knights fought bravely against the English army.[34] Aelred of Rievaulx also praises Henry as "that ornament of youths, glory of soldiers, and delight of old men."[35] Furthermore, Aelred of Rievaulx describes how Henry, discovering that his knights were surrounded by their English foes, crafted a strategy to blend in with their English adversaries and avoid capture. The Scottish prince told his surrounded knights:

> When you can do nothing by force, you can still overcome the enemy by strategy. And so when the standards by which we are marked out from the

[31] Jim Bradbury, "Battles in England and Normandy, 1066-1154," in *Anglo-Norman Warfare: Studies in Late Anglo-Saxon and Anglo-Norman Military Organization and Warfare*, ed. Matthew Strickland (Woodbridge: The Boydell Press, 1992), 191.

[32] Bradbury, "Battles in England and Normandy," 191.

[33] Aelred of Rievaulx, *The Historical Works*, trans. Freeland, 266.

[34] Henry of Huntingdon, *History of the English*, trans. Greenway, IV.9, 72.

[35] Aelred of Rievaulx, *The Historical Works*, trans. Freeland, 268

> others have been cast down, let us mingle with the enemy as if we were
> following them, until we have gone past all of them to my father's
> wedge…[36]

Here, the knights of David I's army are indistinguishable to the Anglo-Norman knights in the English army. The Anglo-Normans fighting on the side of the Scots are clearly demarcated from their unarmored and undisciplined Galwegian allies and are likened to their knightly English counterparts. In this regard, the chronicles of Henry of Huntingdon and Aelred of Rievaulx demonstrate a unity between the practiced and professional Norman warriors, regardless of their respective allegiances at the Battle of the Standard.

Feudalism and Knight-Service

In addition to the warrior ethos inherent in *Normanitas*, the Norman feudal practice of knight-service was evident in the twelfth-century Kingdom of Sicily. Scholarly debate on the extent and homogeneity of Norman feudal institutions in the southern Norman kingdom has persisted, especially concerning the tricky twelfth-century document, the *Catalogus Baronum*, or 'The Catalogue of Barons.' The *Catalogus Baronum* was essentially a southern *Domesday Book*, a list of fiefs and their concomitant military obligations on the Italian mainland, namely in Apulia, the Abruzzi region, and the principalities of Capua and Salerno.[37] Although the *Catalogus Baronum* provides fascinating insight into the Norman military institutions of the kingdom of Sicily, the text

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[36] Aelred of Rievaulx, *The Historical Works*, trans. Freeland, 268.
[37] Graham A. Loud, *Roger II and the Creation of the Kingdom of Sicily: Selected Sources Translated and Annotated* (Manchester: Manchester University Press, 2012), 47.

must be carefully invoked. First, while the *Catalogus Baronum* was composed originally

c. 1150, the document was revised c. 1167, resulting in noticeable amendments and

omissions within the register.[38] Second, for centuries the only manuscript of 'The

Catalogue' available to scholars was a reproduction composed in the thirteenth century,

and this copied manuscript was unfortunately destroyed in 1943.[39]

Undoubtedly in part due to the evolving nature of the document, the *Catalogus*

Baronum has sparked rigorous scholarly debate over the extent to which it demonstrates a

characteristically Norman feudal military network in twelfth-century southern Italy. For

example, some scholars point to the *Catalogus Baronum* to suggest that the military

resources of the Norman kingdom of Sicily "were by origin neither royal nor Norman."[40]

Such scholars suggest that the Normans merely adopted local structures of military

obligation, as evidenced by the numerical superiority of *servientes*, or indigenous soldiers

who were not enfeoffed, in the *Catalogus Baronum*.[41] Despite its scholarly detractors, the

register represents a significant Norman systemization of military obligation in southern

Italy. As Loud asserts, the *Catalogus Baronum* "was the creation, for the first time, of a

unified system of military service owed to the king."[42] Despite having uniquely "reflected

the reality of the existing situation" in its inclusion of local, non-enfeoffed soldiers, the

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[38] Loud, *Roger II*, 329.
[39] Loud, *Roger II*, 48.
[40] Donald Matthew, *The Norman Kingdom of Sicily* (Cambridge: Cambridge University Press, 1992), 257
[41] Matthew, *Norman Kingdom of Sicily*, 256
[42] Loud, *Roger II*, 47.

Catalogus Baronum echoes the contemporary military institutions evident in other

Norman zones, such as England, Normandy, and Scotland.[43]

As noted above, Normans in twelfth-century Scotland were invited colonizers,

and they gained their land and titles through David I's introduction of knight-service as

the basis for land tenure. The most notable example of this process was David I's 1124

grant of Annandale in southwest Scotland to Robert de Brus. Robert de Brus was a noble

from the Cotentin peninsula in western Normandy, a vassal of Henry I, and a close

associate of David I during the Scottish king's years in the Anglo-Norman court.[44] The

grant of Annandale by David I was predicated on military service, which included the

service of ten knights.[45] Annandale's strategic geographic position was also implied, as

the enfeoffment of Robert de Brus created a buffer between David I's chief zone of

Scottish power in the southwest and the province of Galloway, whose steadfastly Gaelic

magnates posed a potential threat to the Norman-inspired king.[46]

Along with Robert de Brus, other Normans and Anglo-Normans were similarly

enfeoffed during the reign of David I. Other prominent Anglo-Norman colonizers of

Scotland were Hugh de Morville, who gained the fiefdoms of Lauderdale and

Cunningham, and Walter fitz Alan, who was enfeoffed with Tweeddale and Renfrew.

Although the charter detailing Robert de Brus' grant of Annandale is unfortunately the

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[43] Loud, *Roger II*, 47.
[44] Anonymous, *The Charters of King David I: The Written Acts of David I King of Scots, 1124-53 and of His Son Henry Earl of Northumberland, 1139-52*, ed. G. W. S. Barrow (Woodbridge: The Boydell Press, 1999), 61-62.
[45] G. W. S. Barrow, *The Kingdom of the Scots: Government, Church and Society from the eleventh to the fourteenth century* (Edinburgh: Edinburgh University Press, 2003), 251.
[46] Bartlett, *Making of Europe*, 79.

only extant record of the Anglo-Norman colonization of southern Scotland under David I, the process appears to have been systematic. Additionally, based on Robert de Brus' corresponding military obligation, we may presume that other imported Anglo-Norman lords similarly retained their Scottish lands through their obligation of military service.[47] Furthermore, the bequeathment of Annandale to Robert de Brus supplies further evidence of the 'Normanness' of military enfeoffment as the 1124 charter was solely witnessed by other Anglo-Norman lords, not Gaelic magnates.[48]

During David I's reign, Normans in Scotland were certainly distinguished by their knight-service. The existing Scottish framework of landholding was largely based on kinships, as opposed to military service. Furthermore, in the first half of the twelfth century there is only one significant example of a native Scot being granted a fief in return for knight-service. According to charter evidence, in 1136 the ancestral territory belonging to Earl Duncan of Fife was turned into a feu.[49]* There is no further evidence of additional conversions from kinship-based holdings to feudal tenure. Therefore, the institution of military enfeoffment clearly distinguished the Norman barons in Scotland in the first half of the twelfth century.

As the twelfth century progressed, the prevalence of the Norman institution of knight-service increased in Scotland. For example, when William the Lion granted the fief of Annandale to the son of Robert de Brus, the number of knights from Annandale

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[47] Barrow, *Kingdom of the Scots*, 251-252.
[48] Bartlett, *Making of Europe*, 80.
[49] John Bannerman, "MacDuff of Fife," in *Medieval Scotland: Crown, Lordship and Community*, ed. Alexander Grant and Keith J. Stringer (Edinburgh: Edinburgh University Press, 1998), 22-23. *'Feu' is the Scottish equivalent of the English 'fief.'

had grown from the original amount of ten knights to the amount of 100 knights.[50] Additionally, military enfeoffment became more common among Gaelic magnates under the kingships of Malcolm IV and William the Lion. During the reign of David I, enfeoffments were limited to the lands south of the Forth, which is seen as the virtual line of demarcation between David I's Norman influence and the influence of Gaelic magnates.[51] Yet, during the reigns of Malcolm IV and William the Lion, a different picture emerges. Under Malcolm IV, three extant charters concerning feudal enfeoffments refer to lands north of the Firth of Forth, and during William the Lion's reign, the number of enfeoffments in extant charter evidence grew to twenty-five north of the Forth.[52] The increase of feudal tenures during the second half of the twelfth century in regions with traditionally strong Gaelic mores reveals that the Norman institution of feudal military service was less confined to the imported Norman barons of David I's reign. One must bear in mind that while the number of native Scottish lords enfeoffed in the twelfth century seems relatively low, the limited amount of extant charter evidence does not necessarily point to a lack of Norman feudal influence. The evidence that does exist "points unmistakably to a steady feudalization of the Celtic regions" of Scotland in the second half of the twelfth century.[53]

Furthermore, while twelfth-century Scotland was not "Normanized beyond recall," as Ritchie once suggested, the Norman military imprint was undoubtedly

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[50] Ritchie, *Normans in Scotland*, 187n.2.
[51] Barrow, *Kingdom of the Scots*, 254.
[52] Barrow, *Kingdom of the Scots*, 254.
[53] Barrow, *Kingdom of the Scots*, 254.

manifest.[54] The Scoto-Norman royals and their Norman barons imbued the Norman

warrior ethos, and the institution of knight-service markedly increased throughout the

century. Although the adoption of knight-service by native magnates in Scotland was

somewhat piecemeal, Norman feudal practices were not without profound influence by

the end of William the Lion's reign in 1214. Thus, as with the Norman conquerors of

southern Italy, Normans of twelfth-century Scotland possessed a distinct *Normanitas*, and

this Norman martial identity resulted in the expansion of feudal military service on the

northern periphery of Europe.

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[54] Ritchie, *Normans in Scotland*, xv.

CHAPTER II
NORMAN STATE-MAKING IN THE KINGDOMS

The northern and southern Norman zones of the twelfth century experienced

developments in royal administrative government due to the influence of Norman, or

'Normanized,' royals and aristocrats. The result of these developments was twofold in

Scotland and southern Italy. First, the emerging administrative apparatuses of the twelfth

century were centripetal, gradually pulling heterogenous areas into the orbit of a

progressively more centralized royal power. Second, since increasingly institutionalized

officials were exclusively members of the nobility with royal sanction to perform their

duties, the rise of administrative government was concomitant with the advancement of

the elite. Thus, twelfth-century kingdoms ruled by Normans or with substantial Norman

influence, such as the Kingdom of the Scots and the Kingdom of Sicily, were comprised

of authoritative kings and potent aristocrats who were not diametrically opposed to one

another within frameworks of administrative government.[1]

The provocative implication here is that Normans in the twelfth century

contributed to the making of medieval states. As noted in Alice Taylor's authoritative

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[1] On the symbiotic power relationship between twelfth-century royalty and nobility, see
Alice Taylor, *The Shape of the State in Medieval Scotland, 1124-1290* (Oxford: Oxford
University Press, 2016) and Thomas N. Bisson, *The Crisis of the Twelfth Century:
Power, Lordship, and the Origins of European Government* (Princeton: Princeton
University Press, 2009). Keith Stringer also provides insight into these works and the
concept of symbiotic power in "The Norman Edge: Some reflections on Norman
expansion into 'Outer Europe'" in *The Normans and the Norman Edge: Peoples, Polities
and Identities on the Frontiers of Medieval Europe*, ed. Keith Stringer and Andrew
Jotischky (London: Routledge, 2019), 233-234, 242.

work on the conceptualization of the medieval state in twelfth- and thirteenth-century

Scotland, historians must tread cautiously when invoking the idea of the 'state' in

analyses of medieval governance.[2] Indeed, the term itself is anachronistic and risks

conjuring incongruous associations with the early modern state or even the present-day

concept of the nation-state. Taylor's definition of the 'state' is instructive:

> [a polity] in which a single, centralized authority has a monopoly over legitimate violence and in which exist abstract, impersonal administrative institutions staffed by (specialized) officials, who are the delegations and manifestations of the areas (justice and defence, for example) over which the state claims authority to provide for the public.[3]

Based on this definition, Normans were indeed contributors to the formation of medieval

states in Scotland and southern Italy in the twelfth century.

The parallels of state formation were first explored in their Norman context by

Charles Homer Haskins in *Norman Institutions*. Although Haskins primarily assessed the

Norman influence on royal and administrative government in Normandy and England, his

work noted that "the contemporary influence of Anglo-Norman institutions extended

from Scotland to Sicily."[4] This chapter will similarly assess Norman influence on

government in Scotland and southern Italy. Despite their dissimilar local contexts, the

Norman and 'Normanized' kingdoms of the twelfth century shared many similar

institutions of specifically Norman or Anglo-Norman origin, such as the justiciar and the

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[2] Taylor, *Shape of the State*, 2.
[3] Taylor, *Shape of the State*, 449-450.
[4] Charles Homer Haskins, *Norman Institutions* (New York: Frederick Ungar Publishing Co., 1918), 3.

chamberlain. Thus, these shared institutions constitute *Normanitas* and demonstrate that state-making was implicitly another facet of Norman identity in the twelfth century.

Before the Normans

Regarding twelfth-century Scotland, the historian A. A. M. Duncan plainly stated that "the agencies of medieval government were founded in that century."[5] In his work on eleventh-century Scotland, Alexander Grant took Duncan's assertion to task as he argued for the existence of an "early Scottish state" prior to the arrival of the Normans during the reign of David I.[6] Grant argued that in the eleventh century, the Scottish state consisted of nine provinces, which were each overseen by an earl (Gaelic: *mormaer*).[7] These provinces and *mormaers* "equate[d] to the earldoms and earls of the Anglo-Norman era."[8] Furthermore, Grant asserted that within each province a local "king's man," or thane (Gaelic: *toísech*), largely conducted the duties that were ultimately dispensed by justiciars and chamberlains in the twelfth century.[9] For instance, the thane collected the king's revenue in the form of tributes, a critical task to the functioning of administrative royal government. Additionally, the earl and thane directed judicial proceedings at

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[5] A. A. M. Duncan, *Scotland: The Making of the Kingdom* (Edinburgh: Mercat Press, 1992), 151.
[6] Alexander Grant, "The Construction of the Early Scottish State," in *The Medieval State: Essay Presented to James Campbell*, ed. J. R. Maddicott and D. M. Palliser (London: The Hambledon Press, 2000), 47-72.
[7] Grant, "Early Scottish State," 55.
[8] Grant, "Early Scottish State," 55.
[9] Grant, "Early Scottish State," 53

regular provincial moots. For Grant, both the *mormaer* and *toísech* were royal officials within a Scottish administrative framework.[10]

Thus, as David I began instituting an administrative apparatus comprised of Norman-styled offices in the second quarter of the twelfth century, there was a degree of precedent for provincial administration. Nonetheless, not all earls and thanes were royally appointed officials or members of a comprehensive administrative network as Grant suggests. For example, many earls and thanes attained their authority by virtue of their power within a kin-group, not due to any appointment by the Scottish king.[11] Further complicating Grant's vision of eleventh-century Scottish administrative government is a lack of consistency in the hierarchy of these officials, as there is evidence of an earl who was simultaneously a thane.[12] Moreover, in the first quarter of the twelfth century thanes were relatively uncommon in southeastern Scotland, which was the focal point of David I's power after his accession to the throne. There is also entirely no evidence of native earls in this region.[13] Therefore, any semblance of an early Scottish state was highly localized exclusively north of the Firth of Forth, and the earls held a tenuous link, if any link at all, to the royal crown. Ultimately, it is difficult to accept Grant's position that Scotland possessed a royally structured administrative government before David I's reign

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[10] Grant, "Early Scottish State," 55.
[11] Taylor, *Shape of the State*, 43. Due to their status as heads of kin-groups, Richard Oram proffers an intriguing analogy, comparing the *mormaer* and *toísech* to the *goði* and *lögsögumaðr* (lawspeaker) of medieval Iceland; see Richard Oram, *Domination and Lordship: Scotland 1070-1230* (Edinburgh: Edinburgh University Press, 2011), 295.
[12] Grant, "Early Scottish State," 54; Taylor, *Shape of the State*, 59.
[13] See map of 'Provinces and Royal Thanages in the Early Scottish State' on p. 59 in Grant, "Early Scottish State."

and the advent of the Normans. Thus, the reality regarding the emergence of an administrative state in Scotland seems to fall somewhere in the middle of Duncan and Grant's opposing assertions: Normans in twelfth-century Scotland contributed novel administrative practices, but in certain areas they also adapted to preexisting native frameworks.

Such overlap of Norman and native administrative frameworks was also the case in the twelfth-century Kingdom of Sicily. At the advent of the Norman kingdom in 1130, Sicily largely operated through an Arabic administrative framework, Apulia and Calabria possessed entrenched Byzantine traditions, and the principalities in the Campania maintained Lombard institutions.[14] Since the Kingdom of Sicily had been invested to Roger II by the Antipope Anacletus II, mainland nobles were reluctant to accept the Norman king's newborn authority. Thus, a unified administrative system was not established until 1139, when Pope Innocent II's attempt to topple the burgeoning Norman kingdom failed and he, as the legitimate Vicar of Christ, officially recognized Roger II's kingdom.[15] The tripartite nature of Roger II's official title as 'King of Sicily, of the duchy of Apulia and of the principality of Capua' implicitly reveals the variegated local contexts encompassing the kingdom, or the *regno*; however, after his investment by the legitimate pope, Roger II was able to develop a unified administrative framework throughout the realm.[16]

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[14] Hubert Houben, *Roger II of Sicily: A Ruler between East and West* (Cambridge: Cambridge University Press, 2002), 148.
[15] Houben, *Roger II of Sicily*, 148.
[16] Houben, *Roger II of Sicily*, 147.

Norman Kings and the Twelfth-Century State

Yet another top-down analysis of medieval kingship is surely not needed; however, one cannot discuss the Norman contribution to medieval state formation without discussing the Norman and 'Normanized' kings who maintained and bolstered administrative power in the twelfth century. For various reasons that will be discussed further below, these kings should not be viewed as omniscient powers that governed comprehensively from the top-down. Rather, the kings in twelfth-century Scotland and southern Italy (as well as England/Normandy) should be seen as central figures within burgeoning administrative frameworks that relied on the rising institutional power of the nobility.

Analysis of contemporary chroniclers reveal similarities in the administrative propensities of Norman and Norman-inspired kings in the twelfth century. Orderic Vitalis describes Henry I as a present and effective administrator of the Anglo-Norman kingdom. Of Henry I, he writes,

> He inquired into everything and retained all he heard in his tenacious memory. He wished to know all the business of officials and dignitaries; and since he was an assiduous ruler, he kept an eye on all the happenings in England and Normandy.[17]

The Anglo-Norman king presents a suitable model for his Norman counterpart, Roger II of Sicily. In Abbot Alexander of Telese's panegyric *The History of the Most Serene Roger, first King of Sicily* the chronicler similarly praises Roger II's oversight.

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[17] Orderic Vitalis, *The Ecclesiastical History of Orderic Vitalis*, Volume VI, trans. Marjorie Chibnall (Oxford: Oxford University Press, 1978), 101.

> [Roger II] hardly ever gave way to idleness or recreation, so much so that if and when it should happen that he was not involved with some more profitable occupation, then either he supervised the public exactions or checked what had been or ought to have been given, or ought to be received, with the result that through studying the accounts he always understood better the revenues which had to be paid to his treasury and from where they ought to be drawn.[18]

Likewise, in his magisterial geographical treatise written at the behest of Roger II, Abû ʻAbdallâh al-Idrîsî commended the administration of the Norman king of Sicily:

> One example of the sublime nature of Roger's knowledge and of his high and elevated instincts is that he wanted to know his lands in a wide-ranging and exacting way, relying on certain and proven information, even though the components of his realm are widespread, that the duties of those involved in his government are many, and that provinces of [mainland] Italy whose inhabitants have submitted to his power and might have recognized his authority.[19]

Interestingly, al-Idrîsî ascribes the peace of the Kingdom of Sicily to the administrative involvement of Roger II, who "holds the reins of his kingdom in the tightest manner and…submits the unfolding of his reign to the best order and the most beautiful of harmonies."[20] Although, al-Idrîsî's characterization is doubtless part of an encomium to Roger II, there is validity to his assertion that the Norman king's government promoted the sustainability of peace. For example, like al-Idrîsî, the chronicler Romuald of Salerno directly links the distribution of administrators with the sustained peace of the kingdom after 1139:

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[18] Abbot Alexander of Telese, "The History of the Most Serene Roger, first King of Sicily," trans. Graham A. Loud in *Roger II and the Creation of the Kingdom of Sicily* (Manchester: Manchester University Press, 2012), IV.3, p. 121.

[19] Abû ʻAbdallâh al-Idrîsî, "The Book of Roger," trans. Graham A. Loud in *Roger II and the Creation of the Kingdom of Sicily* (Manchester: Manchester University Press, 2012), 357.

[20] Abû ʻAbdallâh al-Idrîsî, "The Book of Roger," trans. Loud, 357.

King Roger however established peace and good order in his kingdom, and to preserve that peace instituted chamberlains and justiciars throughout the land, promulgated laws which he had newly drafted and removed evil customs from their midst.[21]

Roger II's ever-recalcitrant subjects living on the mainland rebelled at various times throughout his reign; however, there can be no dispute that the island of Sicily and the *Mezzogiorno* were united as a Norman kingdom with an array of administrative officials dispersed to propagate the king's justice.

There is less palpable comparison made by contemporary chroniclers of the Scottish kings to the Norman kings of England and Sicily; however, we can assuredly discern some similarities. Aelred of Rievaulx mentions David I's close involvement in the burgeoning bureaucracy of his government. In his *Lament for David, King of Scots*, the chronicler described how David I was accustomed to sitting in his court listening to the cases of widows and the poor.[22] Furthermore, the chronicler writes:

Then if a priest, or a soldier or a monk, a rich person or a poor one, a citizen or a stranger, a tradesman or a rustic spoke with him, he so appropriately and humbly discussed the affairs and duties of each that all thought him concerned only with their own business.[23]

Surely this is a constructed image formulated by a sympathetic chronicler after the death of the Scottish king. Nevertheless, Aelred of Rievaulx's characterization of David I provides significant insight into the image that the king of Scots wanted to render as an

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[21] Romuald of Salerno, "Chronicon Sive Annales, 1125-54," trans. Graham A. Loud in *Roger II and the Creation of the Kingdom of Sicily* (Manchester: Manchester University Press, 2012), 259.
[22] Aelred of Rievaulx, *Aelred of Rievaulx: The Historical Works*, trans. Jane Patricia Freeland (Kalamazoo: Cistercian Publications, 2005), 51.
[23] Aelred of Rievaulx, *The Historical Works*, trans. Freeland, 51

involved, cultivated, and solicitous chief executive. The influence of the Anglo-Norman

kingdom on twelfth-century Scottish kingship and royal administrative government was

undoubtedly a consequence of David I's intimate relationship with Henry I, described in

the first chapter.[24]

Administration In Scotland and Southern Italy

David I and his successors experienced a conundrum of royal disconnect in Scotland.

When David I gained the throne in 1124, the extent of his 'Normanized' influence was

within the southeastern territory adjoining the still-fluctuating Anglo-Scottish border. The

southeastern territory, so vital a foothold during the reigns of David I, Malcolm IV, and

William the Lion, begins south of the River Tweed and extends northeast to the Firth of

Forth and west to the Clyde River.[25] This triangular zone is referred to as 'Lothian' in the

twelfth century.[26] In the southwest, the region of Galloway largely withstood Norman

influence during David I's reign and retained a firm Gaelic identity. North of the Firth of

Forth, David I's royal influence was similarly tenuous. To extend his authority

throughout the heterogenous kingdom, David I, relied on administrative systems of

government comprised of aristocratic offices of Norman origin. For example, the Anglo-

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[24] Richard Oram, *Kings & Queens of Scotland* (Gloucestershire: Tempus Publishing Limited, 2006), 70-71.
[25] G. W. S. Barrow, *Kingship and Unity: Scotland, 1000-1306* (Edinburgh: Edinburgh University Press, 1981), 5.
[26] Barrow, *Kingship and Unity*, 5.

Norman and Norman offices of the justiciar and the chamberlain were introduced to Scotland in the second quarter of the twelfth century.

Roger II faced a similar challenge in southern Italy. Reigning remotely in Palermo, Roger II could scarcely maintain direct administrative influence in the *Mezzogiorno*. Despite the praises of the Norman king's personal involvement in the administrative affairs of the kingdom, the actual function of the realm was fundamentally achieved through the increasingly formalized duties of localized administrators, who were exclusively members of the nobility.[27] After 1139, while the island of Sicily was governed directly from the court in Palermo, the Italian mainland was administered by crown-appointed officials.[28] Thus, as David I was consolidating royal power in Scotland through the offices of justiciar and chamberlain, the same offices were introduced to the Norman kingdom of Sicily to maintain royal influence at the local level.

The Justiciar

At the beginning of David I's reign records demonstrate that the *judex*, or 'dempster,' presided over legal cases at an autonomous and eclectic level. Additionally, *judices* are described as conducting perambulations, or formal land surveys to assess the legal boundaries of estates.[29] Nevertheless, the *judices* do not appear to have been explicitly

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[27] Graham A. Loud, *Roger II and the Creation of the Kingdom of Sicily* (Manchester: Manchester University Press, 2012), 40.

[28] Houben, *Roger II of Sicily*, 148-149.

[29] G. W. S. Barrow, *The Kingdom of the Scots: Government, Church and Society from the eleventh to the fourteenth century* (Edinburgh: Edinburgh University Press, 2003), 59.

royal officials. The autonomy of the *judices* is exemplified in Earl Constantine of Fife, who did not conduct any explicit judicial service on behalf of the Scottish king but was designated "'great *judex* of Scotia.'"[30] There is only one extant reference to a *judex* being summoned by David I "'in order that lawsuits and judgements should be prosecuted and given justly.'"[31] As the twelfth century progressed *judices* continued to appear as witnesses in charters, but their status as judges noticeably diminished by the end of the twelfth century. In their place appeared a new judicial administrator, the justiciar.

The royal office of the justiciar was an importation from Anglo-Norman England during the reign of David I, and the title itself illustrates the transformation and evolution taking place in the administration of royal government.[32] Indeed, the justiciars were among "the crown's principle administrative officers."[33] Justiciars are increasingly mentioned in royal charters from the late 1130s onwards.[34] As noted by Barrow in his study of the office of justiciar, thirty-two of David I's extant acts mention justiciars, revealing the consistent employment of the new judicial officer.[35] Justiciars seem to have enjoyed an impressive rank as they were typically listed immediately after barons as addressees and witnesses to royal brieves and charters.[36] Although written evidence of legal activity is relatively scarce during the reign of David I, by the end of the twelfth

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[30] Barrow, *Kingdom of the Scots*, 84.
[31] Barrow, *Kingdom of the Scots*, 58.
[32] Barrow, *Kingdom of the Scots*, 69.
[33] A. D. M. Barrell, *Medieval Scotland* (Cambridge: Cambridge University Press, 2000), 34.
[34] Barrow, *Kingdom of the Scots*, 81.
[35] Barrow, *Kingdom of the Scots*, 82.
[36] Barrow, *Kingdom of the Scots*, 82.

century, the justiciars of Scotland were explicitly conducting trials for both criminal and civil cases as institutional officers.[37] For example, by 1166 William the Lion stipulated that serious offenses, such as arson, homicide, and rape "had been reserved as 'pleas of the crown', to be impleaded before royal justiciars."[38] Additionally, borrowing from a practice in England, the justiciars conducted semi-routine regional circuits known as ayres.[39] By the end of William the Lion's reign in 1214, there were three royal justiciars: for Lothian, Galloway, and Scotia, or the territory north of the Firth of Forth.[40]

That the office of the justiciar represents a Norman innovation in Scotland is evident in the territorialization of the office. In twelfth-century Lothian, for instance, the justiciarship was held mostly by magnates of Norman descent. From the start of David I's reign to the end of the twelfth century, the justiciarship of Lothian was held by David Olifard, his son Walter Olifard, Robert Avenel, and Geoffrey de Melville, all of whom were Anglo-Normans.[41] Those justiciars of Lothian who were not Norman, such as Richard Comyn and Robert de Quincey were 'Normanized' associates of the Scottish kings. In Scotia, Earl Duncan II of Fife, the grandson of Constantine, the 'great *judex*,' was justiciar from c. 1172 to 1204. Like Richard Comyn and Robert de Quincy, Duncan II of Fife was 'Normanized' and owed his position to his close connection to the Scottish king.[42] By the end of the twelfth century, Roland son of Uhtred, a native magnate, was

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[37] Barrow, *Kingdom of the Scots*, 89.
[38] Barrell, *Medieval Scotland*, 35.
[39] Barrell, *Medieval Scotland*, 34.
[40] Barrell, *Medieval Scotland*, 34.
[41] Barrow, *Kingdom of the Scots*, 82.
[42] Indeed, as we saw in Chapter I, the father of Duncan II of Fife was the first native Scot magnate to convert ancestral land into a feu; see above, p. 31n.51.

designated justiciar of Galloway, further highlighting the presence of the Norman

justicarship even in territory of predominantly Gaelic influence.[43] The conversion of

native magnates to Norman officers represents simultaneous continuity and contrast.

Given their positions as earls, Duncan II of Fife and Roland son of Uhtred inherently

possessed a degree of judicial power recognized at the local level. Thus, their

appointment as justiciars by William the Lion represents a continuity in native judicial

function. Nevertheless, that Duncan II of Fife, for example, was styled justiciar *for the*

king rather than '*judex of Scotia*' like his grandfather epitomizes a distinct transition to

Norman influence and the nascent establishment of royal administrative government in

areas of predominantly Gaelic influence.[44]

At almost the same time as justiciars were introduced in Scotland, the office of

justiciar also emerged in the Norman kingdom of Sicily, and the judicial officers

possessed many similarities to their northern counterparts. Around 1140 Roger II

installed justiciars on the Italian mainland "to carry out judicial functions on his behalf

for those lands he became directly responsible for on the mainland…and could not deal

with in person."[45] The justiciars in southern Italy were exclusively members of the

nobility, and they generally outranked other administrative officials, who enjoyed lesser

social standing.[46] The justiciars rendered judgement in landholding disputes and

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[43] Barrow, *Kingdom of the Scots*, 86.
[44] Taylor, *Shape of the State*, 228.
[45] Donald Matthew, *The Norman Kingdom of Sicily* (Cambridge: Cambridge University Press, 1992), 248.
[46] Loud, *Roger II*, 40.

dispensed justice vis-à-vis serious provincial crimes, such as theft, assault, and murder.[47] As with Scotland, the explicit employment of the term 'justiciar' in southern Italy "links it firmly to the tradition of the Anglo-Norman realm."[48] Nevertheless, throughout the mainland the justiciarship was also merged with existing local frameworks. For example, in Calabria the remnants of an enduring Byzantine judicial system was evident as there was a Master Justiciar for the entire region and subsidiary justiciars at the local level.[49]

There were some notable differences between justiciars in the southern and northern Norman peripheries. For example, during Roger II's reign, the justiciars throughout the Kingdom of Sicily neither possessed specific districts of jurisdiction nor performed circuits as "justices in eyre" like their counterparts in England and Scotland.[50] Additionally, there is no evidence that Norman nobles ever operated as justiciars on the Italian mainland. Rather, justiciars in the *Mezzogiorno* were almost exclusively members of influential native families, such as Florius de Camerota, the Lombard nephew of the Archbishop of Capua.[51] In this regard, the use of local men as justiciars on the mainland was analogous to the employment of native-born justiciars in Galloway and Scotia. Despite their ascent to royal supremacy, Normans in southern Italy remained merely one group of people within many variegated local contexts. Thus, native-born justiciars allowed Roger II and his successors to harness existing local powers, who, like Duncan II

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[47] Loud, *Roger II*, 40; Matthew, *Norman Kingdom of Sicily*, 248.

[48] Matthew, *Norman Kingdom of Sicily*, 248.

[49] Houben, *Roger II of Sicily*, 149.

[50] C. Warren Hollister, *Henry I* (New Haven: Yale University Press, 2001), 359; Houben, *Roger II of Sicily*, 149. Houben notes "it was only under William II that true justiciarates, with fixed boundaries, can be found."

[51] Matthew, *Norman Kingdom of Sicily*, 248.

of Fife in Scotland, bolstered their preexisting provincial authority with original Norman institutions.

During the twelfth century the island of Sicily represented a unique departure in the administering of justice compared to Scotland and the Italian mainland. After 1145 justiciars appear in Sicilian sources; however, their royally sanctioned activity is entirely limited to the performance of estate perambulations.[52] There are several reasons for the limited judicial capacity of justiciars on the island. First, as noted previously, Roger II and his successors dispensed justice throughout the island of Sicily directly from the royal court in Palermo. The *curia regis*, or the king's royal court in Palermo, oversaw most serious cases pertaining to non-Muslim subjects. The *curia regis* was comprised of the king and his leading royal officers, including *emirs*, chancellors, and chamberlains. Prior to the arrival of the Normans the title of *emir*, or *amiratus*, was the designation for the Muslim governor of Palermo.[53] During Roger II's reign, the *emir* became a sort of prime minister equivalent to an Arab vizier, but the office was predominantly held by Greek Christians.[54] For example, George of Antioch and Maio of Bari, who were both impressively styled 'grand emir' (*magnus ammiratus*) and 'emir of emirs' (*ammiratus ammiratorum*) exemplify the multi-natured role of the *emir*.[55] In their role as *emir*, George of Antioch and Maio of Bari both functioned as leading administrators, judges, and military commanders. The prominent authority of the *emirs* and the other members of

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[52] Matthew, *Norman Kingdom of Sicily*, 249.
[53] Houben, *Roger II of Sicily*, 150.
[54] Houben, *Roger II of Sicily*, 150.
[55] Houben, *Roger II of Sicily*, 150.

the *curia regis* partly explains the subsidiary role of justiciars in Sicily. A second reason

for the diminished role of justiciars on the island is the overwhelming evidence that

Roger II left local Muslim and Greek judicial systems intact. For example, throughout

twelfth-century Sicily there are accounts of Islamic law proceedings as well as the

continued practice of local Greek judges and *stratigoti*, or military generals of the

Byzantine model, who probably played a role in judicial matters.[56] Thus, on the island of

Sicily, the justiciars seem to have possessed less formal judicial influence than justiciars

on the mainland and in distant Scotland.

The Chamberlain

In addition to the introduction of justiciars, the kingdoms of the twelfth-century Noman

Edge witnessed the advent of chamberlains, another Norman office that strengthened the

administrative state of the kingdoms. In Normandy an official known as the *camerarius*

served as "the centre of financial administration" during the rule of Duke Richard II in

the early eleventh century.[57] The *camerarius* was responsible for the *camera*, or "the

conceptual financial body into which revenue was paid."[58] After the Norman conquest of

England the Anglo-Normans used the title 'chamberlain' to refer to the prominent

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[56] Matthew, *Norman Kingdom of Sicily*, 251.
[57] Jeremy Johns, *Arabic Administration in Norman Sicily: The Royal Dīwān* (Cambridge: Cambridge University Press, 2002), 66.
[58] Taylor, *Shape of the State*, 244.

officials responsible for the royal treasury and the king's personal assets.[59] In England, chamberlains were also involved with the Exchequer, Henry I's innovative system of royal finances and taxation.

Charter evidence demonstrates that the initial appearance of a *camerarius* in Scotland was at the onset of David I's reign in 1124, and the king's *camera* is mentioned in 1141.[60] The first five chamberlains attested in charter evidence appear to be clerics; however, after 1165 the office was held by members of the nobility.[61] Chamberlains were exclusively prominent members of the royal court, and every individual who held the office was in frequent attendance at the king's court and witnesses to royal charters prior to attaining their office.[62] Thus, by the end of the twelfth century, the authoritative status of chamberlains was analogous to that of the justiciars. Furthermore, when aristocratic laymen began assuming the office of the chamberlain in 1165, they were exclusively Anglo-Normans. For example, Philip de Valognes served two terms as royal chamberlain from 1165 to 1171 and 1195 to 1215, and Walter de Berkeley held the chief financial office from 1171 to 1193.[63] In a departure from England, Normandy, and the Norman kingdom of Sicily, the Scottish kings only employed one chamberlain at a time.[64]

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[59] Marjorie Chibnall, *Anglo-Norman England, 1066-1166* (Oxford: Blackwell Publishers, 1986), 123, 124.
[60] Taylor, *Shape of the State*, 244-245.
[61] Taylor, *Shape of the State*, 246-247. Note Table 4.1 on p. 246 listing the "Known chamberlains of David I, Mael Coluim IV, William the Lion, Alexander II, and Alexander III."
[62] Taylor, *Shape of the State*, 247.
[63] Taylor, *Shape of the State*, 246.
[64] Taylor, *Shape of the State*, 246.

Contemporary Scottish records offer frustratingly little regarding the specific activities of chamberlains in the twelfth century. Given that the office of the chamberlain was filled by such prominent individuals, the importance of the office is undoubtable. Despite the dearth of specific attestation to the chamberlain's duties, it is reasonable to suggest that the institutionalization of the royal finances and the establishment of the chamberlain correlated with the introduction of silver coinage during the reign of David I. This coinage, the first of its kind in Scotland, was crucial to the burgeoning administration, and chamberlains surely played some role in its dissemination and collection.[65]

In the Norman kingdom of Sicily chamberlains acted in assorted roles over time. Norman financial institutions were evident as early as the Apulian dukedom of Robert Guiscard in the third quarter of the eleventh century. For example, although there is no evidence that he employed a chamberlain, Robert Guiscard possessed a *camera* storing his ducal revenue.[66] Like the justiciars, chamberlains became prominent throughout the *Mezzogiorno* at the beginning of Roger II's reign. Here the chamberlains were responsible for the management of royal property, the collection of revenues, and to some extent civil governance in small towns.[67]

Chamberlains ostensibly assumed an exceptional role within the court of Palermo. Roger II created a fiscal office under the Arabic name of *dīwān al-tahqīq al-ma'mūr* (the

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[65] Richard Oram, *Domination and Lordship: Scotland 1070-1230* (Edinburgh: Edinburgh University Press, 2011), 97.
[66] Johns, *Arabic Administration*, 66.
[67] Houben, *Roger II of Sicily*, 149.

'office of control' or 'court of accounts').[68] The dīwān was staffed by Muslim converts to Christianity, which likely explains why it retained an Arabic designation. The dīwān was a central royal institution that maintained accounts relating to the royal demesne.[69] While it may be tempting to see an outright comparison between the dīwān and the English Exchequer, unfortunately a lack of contemporary record prevents such equivalences. Unlike the Exchequer, there is no evidence that the dīwān performed an annual audit and comprehensive records such as the English Pipe Rolls are not extant.[70] The dīwān seems to have concerned itself exclusively with royal property management rather than royal finances.[71] From c. 1160 onward, a master chamberlain (*magister camerarius*) appears to have acted as the king's treasurer, in which case he possessed extraordinary influence.[72] By the final quarter of the twelfth century, the master chamberlain, a Norman descendant named Richard, was a member of the privy council, and thus a leading figure in the kingdom until his death in 1187.[73] As in Scotland, the lack of substantive information concerning the actual responsibilities and duties of the chamberlains is frustrating; however, the increasingly organized fiscal structures represented a tightening of royal control, and the chamberlains were doubtless a vital part of this development.

State-Making and Norman Identity

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[68] Houben, *Roger II of Sicily*, 151.
[69] Matthew, *Norman Kingdom of Sicily*, 219.
[70] Matthew, *Norman Kingdom of Sicily*, 219.
[71] Matthew, *Norman Kingdom of Sicily*, 224.
[72] Houben, *Roger II of Sicily*, 151.
[73] Matthew, *Norman Kingdom of Sicily*, 222.

To what extent were Normans in the twelfth century state-makers? Normans in the Kingdom of Sicily were not so much the creators of a state as much as they were the inheritors and unifiers of several preexisting heterogenous states. The reason for this lies in the fact that the frameworks of Roger II's administrative government were, in many ways, already in place when he ascended the throne in 1130 due to the existing local structures of Arab, Greek, and Lombard provenance. In essence, state structures already existed in southern Italy and Sicily, and original Norman institutions like the justiciar and the chamberlain merely added a Norman flair. Although Normans did not have to entirely create a new state structure, the Norman kings of Sicily and their aristocratic administrators can be credited with unifying the heterogenous local frameworks within one kingdom. That the Norman kingdom of Sicily was a unified state is evident in its ability to remain a cohesive, though locally variegated, polity after the death of Roger II in 1154.

Several nobles of Norman descent held influential offices within the royal government. Two Anglo-Normans with experience at the court of Henry I, Thomas Brown and Robert of Selby, served as chancellors during Roger II reign.[74] Additionally, following the death of William I in 1166, Queen Margaret established her Norman cousin, Stephen of Perche, as chancellor to assist with the governance of the kingdom during the years of William II's regency.[75] Margaret and Stephen of Perche were related

[74] Houben, *Roger II of Sicily*, 152.
[75] John Julius Norwich, *The Kingdom in the Sun, 1130-1194* (London: Faber & Faber Limited, 1970), 260.

through the queen's maternal Norman lineage, and Margaret "knew that some of her

kinsmen were more reliable than [the *familiares*]."[76] Thus, traces of Norman identity in

the royal court existed into the second half of the twelfth century.

The case for Norman state-making in southern Italy may also be substantiated by

assessing the vitality of the Kingdom of Sicily after its acquisition by the Hohenstaufen

emperors in 1194. For example, the legacy of Norman state-making in the kingdom of

Sicily is a feature in David Abulafia's biography of Frederick II, the Holy Roman

Emperor and king of Sicily from 1198 to 1250. Abulafia devoted a substantial portion of

his biography to the "Norman inheritance" of Frederick II and his thirteenth-century

kingdom.[77] Indeed, Abulafia argued that Frederick II's given name, Constantine, was, in

part, an homage to his maternal Norman heritage through his mother Constance, the

posthumous daughter of Roger II.[78] But, more significantly, Abulafia also insisted that

Frederick II inherited the ideas of monarchical power and administration of Roger II and

his Norman successors.[79]

The case for Norman state-making is clearer in Scotland. David I can be credited

with laying the foundations for a royal administrative state hitherto unknown in Scotland,

and his grandsons, Malcolm IV and William the Lion, undoubtedly pursued a more

pervasive 'Normanization' of the burgeoning state throughout the remainder of the

twelfth century. Scotland was not devoid of administration at the provincial level due to

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[76] Jacqueline Alio, *Margaret, Queen of Sicily* (New York: Trinacria Editions, 2016), 169.
[77] David Abulafia, *Frederick II: A Medieval Emperor* (London: Allen Lane, 1988). See Chapter One, "The Norman Inheritance," 11-62.
[78] Abulafia, *Frederick II*, 89.
[79] Abulafia, *Frederick II,* 62.

the presence of native earls and thanes. Nevertheless, the links between provincial administrators and the king were often tenuous. In this regard, the advent of Norman institutions and the employment of Normans as professional administrators vastly eclipsed the scale of preceding administrative governance. The province of Lothian is the most profound example of the creation of a Scottish state along the lines of Anglo-Norman England; however, as the twelfth century progressed, the prevalence of justiciars and chamberlains expanded to provinces with strong Gaelic influence. Norman institutions were not accepted in all of Scotland, and some native earls and thanes continued eleventh-century practices at the local level. Yet, Norman influence on administrative government was evident during the twelfth century and continued to expand in the succeeding century.

In Scotland and southern Italy, Norman institutions augmented administrative royal government and the creation, or strengthening, of medieval states, albeit to varying degrees. In both cases Norman institutions permitted the rise of centralized royal government with the capability of establishing more acute attachments to outlying, heterogenous regions within an increasingly unified framework. Significantly, the strengthening of centralized royal power was concomitant and reliant on an increasingly powerful and professional nobility, who were often men of Norman descent. Thus, state-making was indeed a component of *Normanitas* on the peripheries of Europe in the twelfth century.

CHAPTER III

NORMANITAS AND THE *GENS NORMANNORUM*

Scholars have long grappled with the slippery notion of Norman identity.[1] As

discussed in the introduction to this work, some twentieth-century historians, such as

Haskins and Douglas, argued for the collective identity of the Normans as "a separate and

distinct people" regardless of place and time.[2] In short, these scholars identified—and

praised—"Norman history" throughout Europe, "the inherent unity" of Norman

achievement, and the "single Norman endeavor."[3] These historians attributed any

diminishing of Norman identity to their ostensibly exceptional ability to assimilate with

other cultures and peoples. For example, Haskins argued that Normans across Europe

paradoxically lost their identity due to cultural assimilation:

> Wherever [the Normans] went, they showed a marvelous power of
> initiative and of assimilation; if the initiative is more evident in England,
> the assimilation is more manifest in Sicily. The penalty for such activity is
> rapid loss of identity; the reward is a large share in the general
> development of civilization. If the Normans paid the penalty, they also
> reaped the reward, and they were never more Norman than in adopting the
> statesmanlike policy of toleration and assimilation which led to their

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[1] See especially: Charles Homer Haskins, *The Normans in European History* (New York: Frederick Ungar Publishing Co., 1915); R. H. C. Davis, *The Normans and their Myth* (London: Thames and Hudson Ltd., 1976); David C. Douglas, *The Norman Achievement, 1050-1100* (Berkeley: University of California Press, 1969); Hugh Thomas, *The English and the Normans: Ethnic Hostility, Assimilation, and Identity, 1066-c.1220* (Oxford: Oxford University Press, 2003); Nick Webber, *The Evolution of Norman Identity, 911-1154* (Woodbridge: The Boydell Press, 2005).

[2] Davis, *Normans and their Myth*, 13.

[3] Haskins, *Normans in European History*, 2; Douglas, *Norman Achievement*, 218; David C. Douglas, *The Norman Fate, 1100-1154* (Berkeley: University of California Press, 1976), 3.

ultimate extinction.[4]

On the other hand, Davis asserted that a unified Norman identity was merely the product of a constructed historiographical myth propagated by the Norman chroniclers themselves.[5]

Thus far, this work has described *Normanitas* as it related to Norman military prestige and feudal and government institutions on the Norman Edge over the long twelfth century. This chapter will examine the simultaneous attenuation and persistence of collective ethnic identity among Normans in Scotland and southern Italy in the eleventh and twelfth centuries. In doing so, this chapter will assess the extent to which Normans on the peripheries of Europe maintained a distinct identity as members of a *gens Normannorum*. The Latin word '*gens*' possesses multiple meanings that translate to 'blood' and 'stock,' denoting people of a certain group.[6] Thus, the term *gens Normannorum* roughly translates to 'the people of Norman stock' or 'the Norman people.' Bartlett has noted that use of the term *gens* carries the connotation of fixed "biological datum" and race; however, in the high Middle Ages, the meaning of a *gens* was exceptionally fluid, and "medieval ethnicity was a social construct."[7] Thus, ethnic self-awareness as a member of a *gens* was the impressionable culmination of elastic

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[4] Haskins, *Normans in European History*, 246-247.
[5] Davis, *Normans and their Myth*, passim.
[6] Robert Bartlett, *The Making of Europe: Conquest, Colonization and Cultural Change 950-1350* (Princeton: Princeton University Press, 1993), 197.
[7] Bartlett, *Making of Europe*, 197.

components such as customs, language, and law.[8] The preceding chapters of this work have engaged with some of these components of medieval ethnicity.

This chapter will analyze the following criteria: connections to a common place of origin and ethnic identification practices. Accordingly, this chapter will identify ways in which Normans in twelfth-century Scotland and southern Italy viewed themselves as members of a *gens Normannorum* by retaining ties to Normandy and classifying themselves as Normans. In most cases the concrete territorial and biological links between Normans in the twelfth century gradually diminished through diaspora and exogamous marriage; however, individuals of the steadily broadening *gens Normannorum* maintained a sense of Norman identity through the crafting of collective ethnic memory despite losing attachment to Normandy. Additionally, in some instances, Normans preserved their identity through continued links to Normandy and by distinguishing themselves and their customs from an 'other,' such as the native Scots.

Medieval ethnicity must be viewed "as a process" with "dynamic rather than static attributes."[9] The local contexts of Normans in Scotland and southern Italy presented unique challenges, and thus, Normans on the peripheries adapted their perceptions of self-identity to meet their respective needs. Ultimately, the dynamic nature of medieval ethnicity did not necessarily entail a "rapid loss of identity" for Normans in the twelfth century, as Haskins surmised. Rather, this chapter will reveal the complexity,

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[8] Bartlett, *Making of Europe*, 197.
[9] Thomas, *English and the Normans*, 15.

plurality, and, however marginal, the tenacity of the *gens Normannorum* in the twelfth century.

Normans and Normandy

Normans and the *gens Normannorum* in southern Italy were initially identified by their origin in Normandy. Indeed, Davis asserted that "the one thing which made a man Norman was his attachment to Normandy," however contrived.[10] The territory of Normandy derived its name from its inhabitants, and thus "the Normans belonged to it."[11] Thus, when Normans began conquering southern Italy in the eleventh century, they initially maintained a sense of attachment to Normandy, which their contemporary authors stressed. The chroniclers of the Norman conquest of southern Italy included descriptions of Normandy at the beginning of their works that firmly linked the southern conquerors to their native land. For example, Geoffrey Malaterra opened his eleventh-century chronicle describing Normandy as a verdant homeland:

> Normandy is most abundant in rivers filled with fish and forest filled with game; it is most suitable for falconry. It is fertile with wheat and other types of grain, abundant in sheep, and nourishes many cattle. On account of this, Rollo and his men set out from the banks of the river and began to subject the inhabitants of that region to their dominion.[12]

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[10] Davis, *Normans and their Myth*, 57.

[11] Davis, *Normans and their Myth*, 57.

[12] Geoffrey Malaterra, *The Deeds of Count Roger of Calabria and Sicily and of His Brother Duke Robert Guiscard*, trans. Kenneth Baxter Wolf (Ann Arbor: The University of Michigan Press, 2005), 1.1, p. 51.

Thus, Geoffrey Malaterra's chronicle crafted a direct connection between the conquering Normans of southern Italy and their fertile land of origin. Geoffrey Malaterra also significantly identifies the Normans with Rollo, their ambitious progenitor. Geoffrey Malaterra possessed a keen awareness of the origins of the Normans he chronicled, and this is likely due to his own Norman heritage. Although he never explicitly identified his birthplace, Geoffrey Malaterra describes the Normans several times throughout the work as "*nostri*," or "our men."[13]

The late eleventh-century chronicle of Amatus of Montecassino also begins by connecting the southern conquerors to their erstwhile homeland. He writes, "at the end of France there is a plain filled with woods and fruit trees," and in this place "lived a great number of very robust and strong people."[14] Additionally, just as Geoffrey Malaterra traced the relation of the Normans of southern Italy to Rollo, Amatus of Montecassino also provided a hereditary link to an illustrious Norman, William the Conqueror.[15] Amatus of Montecassino was likely a Lombard, but his connection between the Normans of southern Italy and William the Conqueror makes it clear that he understood the origins of the Normans.[16] Regardless of their birthrights, Amatus of Montecassino and Geoffrey

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[13] The only detail that Geoffrey Malaterra provides regarding his birthplace is a general statement referring to his origin north of the Alps: "You are well aware that I come from a region on the other side of the mountains, having only recently become an Apulian and indeed a Sicilian." Geoffrey Malaterra, *Deeds of Count Roger*, pp. 6, 41-42. For examples of Geoffrey Malaterra's reference to the Normans as "our men," see Malaterra, *Deeds of Count Roger* 2.17, p. 94 and 2.35, p. 113.

[14] Amatus of Montecassino, *The History of the Normans*, trans. Prescott N. Dunbar (Woodbridge: The Boydell Press, 2004), I.1, p. 45.

[15] Amatus of Montecassino, *History of the Normans*, trans. Dunbar, I.3, p. 46.

[16] Loud, *Age of Robert Guiscard*, 82.

Malaterra seem to have intentionally defined the place of origin of members of the *gens Normannorum*. This points to the existence of a recognized and understood Norman identity in eleventh-century southern Italy that pointed directly back to their origins in Normandy.

By contrast, writing c. 1100, William of Apulia never clarified the Normans' place of origin and referred only vaguely to the conquerors as 'Gauls' and 'Franks,' umbrella terms that did not explicitly connect them to Normandy.[17] On account of this lack of specificity towards the Normans' origins, and due to his chronicle's sympathetic tone towards the Lombards, scholars largely maintain that William of Apulia was likely a Lombard layman.[18] Other non-Normans also struggled to accurately define the Normans' specific geographic origins. In her description of "that braggart Robert [Guiscard]," Anna Comnene, the daughter of the Byzantine emperor Alexios Comnenus, accurately placed his birth in Normandy.[19] Nevertheless, Anna Comnene's work features imprecise and interchangeable use of the appellations "Kelt, Latin, Frank, and Norman," so her understanding of the true composition of the *gens Normannorum* and their specific ties to Normandy is questionable.[20]

Over the course of the twelfth century, Normans in southern Italy lost their ties to Normandy. One reason for this loss of connection to their homeland was that Normans in

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[17] G. A. Loud, *The Age of Robert Guiscard: Southern Italy and the Norman Conquest* (Harlow: Pearson Education Limited, 2000), 81.
[18] Kenneth Baxter Wolf, *Making History: The Normans and Their Historians in Eleventh-Century Italy* (Philadelphia: University of Pennsylvania Press, 1995), 127.
[19] Anna Komnene, *The Alexiad*, trans. E. R. A. Sewter (London: Penguin Books Ltd., 2009), 30.
[20] Anna Komnene, *The Alexiad*, trans. Sewter, 481n.5.

southern Italy generally did not intend to return to Normandy. Overpopulation in

Normandy was likely one reason that Normans emigrated to southern Italy. Amatus of

Montecassino wrote, "The people had increased to such a number that the fields and

orchards were not sufficient for producing the necessities of life for so many."[21] The

illustrious Hauteville family, which included Robert Guiscard and Count Roger, featured

no less than twelve sons. Geoffrey Malaterra described their predicament:

> The sons of Tancred [de Hauteville] noticed that whenever their aging
> neighbors passed away, their heirs would fight amongst themselves for
> their inheritance resulting in the division of the patrimony—which had
> been intended to fall to the lot of a single heir—portions that were too
> small. So the brother took counsel among themselves in order to avoid the
> same thing happening to their descendents [sic]. […] Ultimately, with the
> guidance of God, they came to Apulia, a province in Italy.[22]

Thus, overpopulation had rendered little land in Normandy for many younger sons, who

departed for southern Italy to carve out their own land.

Yet, by their sheer numbers, the Hautevilles were surely an exceptional case. For

this reason, the decision to leave Normandy cannot be solely reduced to a matter of

overpopulation. Bartlett has noted that the rise in primogeniture and land inheritance

practices based on legitimate patrimony were also significant factors in the dispersal of

young Normans in the eleventh and twelfth centuries.[23] Additionally, Loud has suggested

that many Normans in southern Italy left Normandy due to the political strife of the first

half of the eleventh century. Norman rebels who fell afoul of Duke William, such as

William Warlenc and Robert de Grandmesnil, made their way to southern Italy as

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[21] Amatus of Montecassino, *History of the Normans*, trans. Dunbar, I.1, p. 45.
[22] Geoffrey Malaterra, *Deeds of Count Roger*, 1.5, p. 54.
[23] Robert Bartlett, *Making of Europe*, 49.

political exiles.[24] Regardless of whether the issue was overpopulation, diminishing

opportunities due to changes in land inheritance, or political exigency, Normans who

traveled to southern Italy had little reason to maintain ties to Normandy. Thus, it is no

surprise that Orderic Vitalis wrote of one Norman:

> [H]e travelled to Apulia, where he had kinsfolk of high rank who received
> him kindly, and won a reputation by his many exploits. He took to wife a
> noblewoman of Lombard stock, and secured possession of thirty towns
> under Robert count of Loritello, nephew of Guiscard. His wife proving
> fruitful, he had many sons and daughters; and for almost forty years he
> lived with great honour among the Lombards, forgetting Normandy.[25]

This Norman undoubtedly did not literally 'forget' Normandy; however, Orderic Vitalis'

comment exemplifies the fact that most Normans in southern Italy abnegated their

territorial ties to Normandy in favor of their new land in the south.

Just as southern Italy may have presented an opportunity for the sons of

Normandy, twelfth-century Scotland offered a similar prospect. Indeed, Barrow asserted

that Scotland became "a land for younger sons."[26] Those who expected a paltry

inheritance due to primogeniture or patrimonial rights could find in Scotland a new land

of opportunity for advancement and property. Nevertheless, with the Anglo-Norman

kings of England ruling a cross-Channel kingdom that included the duchy of Normandy,

the place of origin for Normans in Scotland has generally been taken for granted. Barrow

noted that it was "a commonplace of Scottish history" that David I, as the Earl of

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[24] Loud, *Age of Robert Guiscard*, 88-89.
[25] Orderic Vitalis, *The Ecclesiastical History of Orderic Vitalis*, vol. II, trans. Marjorie Chibnall (Oxford: Oxford University Press, 1969), 127.
[26] G. W. S. Barrow, *The Anglo-Norman Era in Scottish History* (Oxford: Oxford University Press, 1980), 1, 7.

Huntingdon and Northampton, recruited Anglo-Norman barons chiefly from his lands in England.[27] For example, Ritchie asserted, "Most [of David I's] followers came from his midland earldom. Loyalty to the Earl of Northampton and Huntingdon was their guiding star."[28] Yet, although not directly stated, the Norman lords who were recruited by David I, "whose fathers and grandfathers appear in Domesday," could trace their families' origins to Normandy.[29] Furthermore, Barrow argued, "there must be more than a suspicion that [David I] drew his chief supporters—Brus, Morville, Soules, and Avenel— direct from Normandy."[30] Barrow derived this conclusion from several pieces of evidence. For example, when David I began importing Norman nobles into Scotland in 1124, there is little or no charter evidence connecting many of the Norman nobles, such as the Brus, Morville, and Soules families directly to lands in Northamptonshire or the Honour of Huntingdon.[31] Additionally, Stringer's research drawing upon social science theories of diaspora has revealed continuing landholding and patronage ties to Normandy in colonizers of twelfth-century Scotland, including the Soules, Umfraville, and Vieuxpont families.[32] Unlike the more detached Normans in southern Italy, these conclusions point to potent associations with Normandy among some of the Norman colonizers of Scotland.

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[27] Barrow, *Anglo-Norman Era*, 97-98.
[28] R. L. G. Ritchie, *The Normans in Scotland* (Edinburgh: Edinburgh University Press, 1954), 214.
[29] Ritchie, *Normans in Scotland*, 157.
[30] Barrow, *Anglo-Norman Era*, 99.
[31] Barrow, *Anglo-Norman Era*, 99.
[32] Keith Stringer, "Aspects of the Norman Diaspora in Northern England and Southern Scotland," in *Norman Expansion: Connections, Continuities and Contrasts*, ed. Keith J. Stringer and Andrew Jotischky (London: Routledge, 2013), 9-48.

Norman Ethnic Identification

Normans in southern Italy were initially ethnically distinct from the local Lombards; however, scholarship has generally held that the Normans integrated entirely with Lombards through intermarriage and cultural assimilation by the middle of the twelfth century.[33] Indeed, Norman-Lombard intermarriage was prominent throughout the eleventh century. The most prominent example was Robert Guiscard's marriage to a Lombard princess. Repudiating his Norman wife Elbarada on the grounds of consanguinity, Robert Guiscard married Sichelgaita, the daughter of the prince of Salerno, Guaimar V. It is important to note that the Normans were vastly outnumbered in southern Italy, so intermarriage was essentially a matter of political, and perhaps actual, survival.[34] Thus, the aim for Robert Guiscard was likely to strengthen and solidify his political standing with local Lombard rule. Nevertheless, his marriage to a Lombard princess did not immediately diminish ethnic divisions. For instance, as Robert Guiscard warred with Sichelgaita's brother, Gisulf II of Salerno, the Salernitan prince pleaded with

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[33] See G. A. Loud, "How 'Norman' was the Norman Conquest of Southern Italy?" *Nottingham Mediaeval Studies* 25 (1981): 3-34; G. A. Loud, "Continuity and Change in Norman Italy: the Campania during the Eleventh and Twelfth Centuries," *Journal of Medieval History* 22, no. 4 (December 1996): 313-343.

[34] See Loud, *Age of Robert Guiscard*, 278-279. "The question of numbers is imponderable: we shall never know how many Normans/Frenchmen settled in southern Italy and what proportion of the total population they were (although one scholar has suggested that there may have been some 2,000-2,500 noble and knightly settlers). Such an estimate is no more than guesswork; but the slowness, and the incompleteness, of the conquest imply that the newcomers were few."

his Norman brother-in-law: "'You should not consider your relationship with the Normans but should consider our relationship, which unites us.'"[35] By the end of the eleventh century, Norman and Lombard ethnicities remained distinct but were increasingly connected. Geoffrey Malaterra criticized Roger Borsa, the son of Robert Guiscard and Sichelgaita, for treating Normans and Lombards equally:

> [Roger Borsa] believed that the Lombards were as faithful to him as were the Normans—after all, he was himself part Lombard on his mother's side. Aware of no ill feelings on the part of the Lombards toward our people, the duke delegated his fortresses to their care no differently than he did to the Normans.[36]

Thus, at the beginning of the twelfth century, there were signs of impending Norman and Lombard assimilation; however, some authors remained keen to make ethnic distinctions.

Judging by contemporary chroniclers, Norman ethnic identity in southern Italy diminished during the reign of Roger II. In his biography of Roger II, which was commissioned by the king's sister, Alexander of Telese emphasized Roger II's relation to his father, Count Roger, and his uncle, Robert Guiscard. Despite the implication that Roger II descended from these Norman conquerors, the chronicler never directly referred to Roger II as a Norman. Rather, Alexander of Telese's emphasis on the Norman king's heroic pedigree seems primarily political. Roger II is described as "a scion of the Guiscard's lineage through whom the ducal power might quickly be revived."[37] Thus, the chronicler provided legitimacy for Roger II's rule over the perennially rebellious duchy

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[35] Amatus of Montecassino, *History of the Normans*, trans. Dunbar, VIII.27, p. 201.
[36] Geoffrey Malaterra, *Deeds of Count Roger*, 4.24, p. 203.
[37] Alexander of Telese, "The History of the Most Serene Roger, first King of Sicily," trans. Graham A. Loud, in *Roger II and the Creation of the Kingdom of Sicily* (Manchester: Manchester University Press, 2012), I.1, p. 65.

of Apulia. For Alexander of Telese, Roger II's tacit Norman heritage was only significant as it related to political legitimacy. In the geographic treatise commissioned by Roger II, al-Idrîsî also addressed the king's paternal lineage. Referring to Roger II's father, al-Idrîsî wrote:

> It was in the year 453 from the Hegirah [1061] that the most illustrious, the most valiant, the most powerful and the most brilliant of kings, Roger son of Tancred, the best of the Frankish kings, conquered the principal towns of Sicily…[38]

Here, Roger II is not of specifically Norman stock but the son of a 'Frankish' lord. Therefore, contemporary authors who were commissioned by Roger II or his wife either implicitly associated him with his Norman progenitors or labelled him a Frank.

Nevertheless, there are some examples of Norman ethnic distinction throughout the twelfth century. In one contemporary document Roger II referred to a group of men as "*nostri Normanni*," or "our Normans."[39] In his work on Norman identity, Webber asserted that Roger II's use of language here does not suggest belonging to the *gens Normannorum* but to the king's possession of royal subjects. Accordingly, Webber argued that Roger II was not referring to this group of Norman men as kinsmen but merely as separate and subordinate members of his ethnically diverse kingdom. Webber may be correct, but Roger II's acknowledgement of specifically Norman subjects suggests that Normans remained a distinct ethnic group during his reign.

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[38] Abû 'Abdallâh al-Idrîsî, "The Book of Roger," trans. Graham A. Loud in *Roger II and the Creation of the Kingdom of Sicily* (Manchester: Manchester University Press, 2012), 357.
[39] Donald Matthew, *The Norman Kingdom of Sicily* (Cambridge: Cambridge University Press, 1992), 170.

The use of ethnic identifiers also indicates the persistence of *Normanitas* in the twelfth century. In southern Italy the descendants of Normans perpetuated ethnic memory by using Norman paternal identifications.[40] For example, in Salernitan charters from 1096 two men identified themselves as "'Donebaldus son of Herbert, sprung from the race of the Normans'" and "'Lambert from the Norman race.'"[41] More examples can be found in the twelfth century. In a charter of 1118, we find an "'Adam son of Gilbert the Norman of Castellum S. Georgio,'" and in 1145, there is documentation of "'Robert Mustazza, son of William the Norman.'"[42] Drell's extensive research into Salernitan charters indicates that Norman paternal identifiers persisted into the 1170s.[43] Loud has argued that the subtle change of describing oneself as 'the Norman' or 'from the Norman race' to 'the son of a Norman' implies the disintegration of Norman identity.[44] Loud is correct that the subtle change reflects the gradual integration of Normans and Lombards through intermarriage and assimilation; however, that sons of Norman descent were still referring to the Norman heritage of their fathers demonstrates that some sense of *Normanitas* persisted in southern Italy late into the twelfth century.

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[40] For extensive discussion of Norman ethnic memory and paternal identifiers, see: Joanna H. Drell, *Kinship & Conquest: Family Strategies in the Principality of Salerno During the Norman Period, 1077-1194* (Ithaca: Cornell University Press, 2002), Chapter 4, "Lineage and the Memory of Kinship;" Joanna H. Drell, "Cultural syncretism and ethnic identity: The Norman 'conquest' of Southern Italy and Sicily," *Journal of Medieval History* Vol. 25, No. 3 (1999): 187-202; Loud also concisely discusses Norman paternal identifiers in *Age of Robert Guiscard*, pp. 286-289.
[41] Loud, *Age of Robert Guiscard*, 287.
[42] Drell, "Cultural syncretism and ethnic identity," 199.
[43] Drell, "Cultural syncretism and ethnic identity," 199.
[44] Loud, *Age of Robert Guiscard*, 288.

In twelfth-century Scotland, Normans were contrasted ethnically to the native Scots. John of Worcester's chronicle provides evidence of an awareness of distinct Norman ethnicity at the turn of the century. Regarding the 1094 Scottish succession crisis between Donnchad, son of Máel Coluim, and his uncle Domnall Bán, John of Worcester wrote:

> [Donnchad] moved swiftly to Scotland with a multitude of English and Normans, expelled his uncle [Domnall Bán] from the kingdom, and ruled in his place. At length many Scots gathered together and slew almost all his followers, he barely escaping, with only a few. Nevertheless, afterwards they allowed him to reign over them on condition that he would no longer bring English or Normans into Scotland…"[45]

This passage from John of Worcester is insightful for several reasons. First, the passage illustrates that in the first half of the twelfth century, English and Normans could be viewed as separate, but similar, ethnic groups. Second, John of Worcester's account reveals stark barriers between the English/Normans and the Scots, a division defined almost unanimously by twelfth-century Anglo-Norman chroniclers.

By far the most ethno-conscious chronicler of the twelfth century was Aelred of Rievaulx. Despite his English heritage, Aelred of Rievaulx was steward of David I's household, so his chronicle uniquely offers a Scottish perspective on ethnic distinctions.[46] Aelred of Rievaulx's account of the pre-battle tensions in the Scottish army at the Battle of the Standard illustrates ethnic differences in the Scottish army. As mentioned in the

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[45] John of Worcester, *The Chronicle of John of Worcester*, vol. III, trans. P. McGurk (Oxford: Oxford University Press, 1998), 67-69.
[46] Alexander Grant, "At the Northern Edge: Alba and its Normans," in *Norman Expansion: Connections, Continuities, and Contrasts,* ed. Keith J. Stringer and Andrew Jotischky (London: Routledge, 2013), 60.

first chapter, Aelred of Rievaulx crafted a pre-battle speech in which Robert de Brus

pleaded with David I to avoid conflict with the English army. Robert de Brus' invented

speech revealed a keen sense of ethnic *Normanitas* distinct from other ethno-cultural

groups. He asked David I, "'Against whom are you raising arms today and leading this

immense army? Surely against the English and the Normans!'"[47] Here, Normans and

English remain two distinct groups with albeit similar proclivities for justice and wisdom.

The Normans and English are clearly juxtaposed to the native Scots within David I's

army, who are described as "wicked men" of poor counsel.[48] Yet, Aelred of Rievaulx,

through the constructed speech of Robert de Brus, does not stop there. He even identifies

ethnic nuance among the native Scots by specifically singling out David I's new reliance

on the particularly ferocious men of Galloway.[49] Ultimately, Aelred of Rievaulx's

chronicle illustrates an awareness of complex and diverse ethnicity in Scotland at the

time of the Battle of the Standard. Significantly, Aelred of Rievaulx demonstrates that

Normans were a distinct ethnic group in Scotland in the first half of the twelfth century.[50]

Henry of Huntingdon's account of the Battle of the Standard also reveals ethnic

differences between David I's Normans and their Scottish allies. Nevertheless, the

chronicle of Henry of Huntingdon is not as straightforward as that of Aelred of Rievaulx.

For example, he attributed a speech to Ralph, bishop of the Orkneys, to the "[n]oblemen

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[47] Aelred of Rievaulx, *Aelred of Rievaulx: The Historical Works*, trans. Jane Patricia Freeland (Kalamazoo: Cistercian Publications, 2005), 261.

[48] Aelred of Rievaulx, *The Historical Works*, trans. Freeland, 263.

[49] Aelred of Rievaulx, *The Historical Works*, trans. Freeland, 255, 263.

[50] For discussion on ethnicity in the works of John of Worcester and Aelred of Rievaulx, see Grant, "At the Northern Edge," 58-60.

of England, renowned sons of Normandy," conflating the English and Normans fighting

against the Scots.[51] Here, English and Norman are synonymous; however, when praising

the actions of David I's son, Henry, the chronicler writes that "his [line]…was composed

of English and Normans who lived in his father's household."[52] The inconsistency,

frustrating as it is, reflects the fluidity of ethnicity in the twelfth century. Regardless of

whether Henry of Huntingdon viewed English and Normans as synonymous or separate,

the native Scots are the definitively dissimilar ethnic group participating in the battle. The

native Scots, who Henry of Huntingdon refers to as "Lothians," are singularly described

as drunken, crazy, and villainous.[53]

As the twelfth century proceeded contemporary chroniclers did not continue to

refer specifically to Normans in Scotland. Rather, twelfth-century chroniclers referred

variably to Norman knights in the Scottish armies as 'English' and 'French.' For

example, in his account of the Battle of the Standard Richard of Hexham portrayed David

I at the center of the Scots army with "his knights and English."[54] On the other hand, in

his account of the Scottish invasion of northern England in 1173, the chronicler Jordan

Fantosme described William the Lion referring to his Anglo-Norman knights as "our

Frenchmen."[55] In this case, it appears that those of Norman descent were merely part of

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[51] Henry of Huntingdon, *The History of the English People, 1000-1154*, trans. Diana Greenway (Oxford: Oxford University Press, 2002), IV.8, 70.
[52] Henry of Huntingdon, *History of the English*, trans. Greenway, IV.8, 71, IV. 9, 72.
[53] Henry of Huntingdon, *History of the English*, trans. Greenway, IV.8, 71, IV. 9, 72.
[54] Richard of Hexham, "The Acts of King Stephen, and the Battle of the Standard," in *The Church Historians of England, Vol. IV, Part I*, trans. Joseph Stevenson (London: Seeleys, 1856), 50.
[55] Jordan Fantosme, *Chronicle of the War Between the English and the Scots in 1173 and 1174*, trans. Francisque Michel (London: J. B. Nichols and Son, 1840), 79.

an assortment of Anglo-French knights with no discernable ethnic differences. The only specific reference to Normans in Jordan Fantosme's chronicle designates inhabitants of Normandy.[56] Whether those of Norman descent in Scotland saw themselves as English or French or some combination of the two is unclear, but one fact is evident: they were no longer referred to by their contemporaries as distinctly 'Norman.'

Regardless of whether Normans in the Scottish armies were seen as English or French, they were still viewed as fundamentally different from the native Scots. Perpetuating a duality between English decency and native Scot barbarity, Anglo-Norman chroniclers, like Richard of Hexham and Jordan Fantosme, characterized the Scots as the "hated people," "savage," and "barbarian."[57] In both chronicles, the 'English' and 'French' knights within the Scottish army are set apart from their native Scot allies. When one considers that the invasion of the Scots was undertaken amid an English revolt led by Henry, eldest son of Henry II, the knights of Norman descent in the Scottish army can plausibly be seen as participants in a civil war against their Anglo-Norman cousins. Jordan Fantosme alludes to the commonality between the knights in the opposing English and Scottish armies when he describes the Battle of Alnwick thus: "our [English] royal knights behave very well, [a]nd those of Albany [Scotland] were very good vassals."[58] Furthermore, William the Lion's Norman knights are similarly described as men who "behaved very well" in the battle.[59] These characterizations of gentility are in stark

[56] Jordan Fantosme, *War Between the English and the Scots*, trans. Michel, 11.
[57] Richard of Hexham, "Acts of King Stephen," trans. Stevenson, 50; Jordan Fantosme, *War Between the English and the Scots*, trans. Michel, 63, 35.
[58] Jordan Fantosme, *War Between the English and the Scots*, trans. Michel, 85.
[59] Jordan Fantosme, *War Between the English and the Scots*, trans. Michel, 85, 87.

contrast to the acrimonious portrayal of the native Scots. Indeed, in addition to the native Scots, the main villains of Jordan Fantosme's chronicle are the Flemish mercenaries under William the Lion's employ.[60] Thus, the Normans of the Scottish army are "not to be blamed" and are implicitly portrayed as analogous to their noble English adversaries.[61]

The Fate of Normanitas

What conclusions can we draw regarding the fate of *Normanitas* and the *gens Normannorum* over the course of the twelfth century? Ultimately, Norman ethnic identity was malleable and subject to local contexts. Although Normans in southern Italy initially maintained a sense of common origin, their gradual assimilation with Lombards and their lack of actual ties to Normandy made such connections to their homeland obsolete. Thus, over the course of the twelfth century, outside observers increasingly merged the Normans of southern Italy with larger ethno-cultural groups, such as the Franks and the Latins. A similar process took place in twelfth-century Scotland. Although some Normans in Scotland maintained ties to Normandy, by the final quarter of the twelfth century they were labeled as English or French. In this regard, Normans in Scotland and southern Italy seem to have been simultaneous participants in and victims of the homogenization of Latin Christendom, or what Bartlett coined the "Europeanization of Europe."

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[60] Jordan Fantosme, *War Between the English and the Scots*, trans. Michel, 83.
[61] Jordan Fantosme, *War Between the English and the Scots*, trans. Michel, 85.

This is not to suggest that the *gens Normannorum* was entirely dissolved. Medieval ethnicity was more complex and multifaceted than to be reduced to such absolute conclusions. A late twelfth-century passage by the anonymous author who wrote under the pseudonym of Hugo Falcundus is instructive. Writing in c. 1190, the pseudo-Hugo Falcundus referred to Roger II's acknowledgement and esteem for individuals of shared Norman origin while also conflating Normans with 'the French race:'

> Since [Roger II] derived his own origin from the Normans and he knew that the French race excelled all others in the glory of war, he chose to favour and honour those from north of the Alps particularly.[62]

Webber explains this succinctly in his examination on Norman identity: "a Norman could be of many cultures, either Germanic or Romance, and of one, Norman."[63]

Thus, *Normanitas* and the *gens Normannorum* in the twelfth century must be viewed as diverse and dynamic. There are examples from Scotland and southern Italy in which Normans retained awareness of their Norman lineage into the latter part of the twelfth century. The sons and grandsons of Norman conquerors in southern Italy continued to refer to their forebears' Norman heritage. Even though Normans like the Soules family in Scotland were labeled as English or French by the end of the twelfth century, they were still active landholders and patrons in Normandy. Norman identity, although undoubtedly diminishing in the twelfth century, did not unequivocally vanish.

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[62] Anonymous, *The History of the Tyrants of Sicily By 'Hugo Falcundus' 1154-69*, trans. Graham A. Loud and Thomas Wiedemann (Manchester: Manchester University Press, 1998), 58.
[63] Webber, *Evolution of Norman Identity*, 38.

CONCLUSION

How does this study of *Normanitas* bolster or challenge long-held notions of Norman achievement, empire, myth, and unity? To begin, the model of Norman achievement is outdated and presents a fallacious teleology that places the Normans at the center of medieval European history, a ridiculous notion out-of-hand. Regarding the issue of Norman identity, Normans were indeed remarkable warriors and state-makers, and their expansiveness is a testament to their military and political successes; however, 'Norman' achievement occurred at varying times on the Norman Edge. For example, David I and Roger II may have ascended their thrones coincidentally within the same decade. Yet, notably, by 1194 the kingdom of Sicily was no longer ruled by Normans whereas the kingdom of the Scots seemed to be hitting its stride with the expansion of Norman state institutions during the reign of William the Lion. Ultimately, this difference in trajectories of the Norman, or Norman-inspired, kingdoms on the peripheries demonstrates that the argument for a collective Norman achievement is untenable.

Next is the question of Norman empire. Undoubtedly, the Scottish kings of the early twelfth century owed their crown to the support and patronage of Anglo-Norman kings. David I's power was also augmented by his Norman and Anglo-Norman vassals with cross-Border and cross-Channel connections. In the south, Roger II's kingdom witnessed the practiced administrative care of professionals with backgrounds in the Anglo-Norman court. Nevertheless, it is impossible to view the kingdoms of the Scots and of Sicily as extensions of a unified Norman empire. David I, Malcolm IV, and

William the Lion, while possessing feudal ties to England, ruled their northern kingdom independently. Likewise, Roger II and his successors governed the Kingdom of Sicily autonomously. Neither the Kingdom of the Scots or the Kingdom of Sicily derived its power directly from the Anglo-Norman kingdom, so the three entities must be viewed as three separate political powers, not as a comprehensive Norman empire.

Was the idea of the Normans as a separate and distinct people a myth? There is certainly merit to the arguments of recent scholars that Norman historians crafted propagandistic narratives that stressed Norman exceptionality and individuality. Additionally, the concept of a Norman myth is a valuable reminder that medieval ethno-cultural labels must be cautiously accepted and judiciously appraised. Nonetheless, I am not convinced that *Normanitas* was merely a literary construction of Norman chroniclers. Evidence abounds of martial experience, institutions, and practices of ethnic memory by Normans in areas like southeastern Scotland and southern Italy. While there may have existed varying, and steadily diminishing, degrees of Norman self-awareness, the awareness existed on the Norman Edge until late in the twelfth century. The continued landholding and patronage practices in Normandy of some Norman families living in Scotland and the persistence of Norman self-identifiers in southern Italy cannot be reduced to literary myth. Additionally, the Norman myth does not explain why non-Norman chroniclers, such as Aelred of Rievaulx, referred to the Normans as a separate and distinct ethnic group. If the myth of Norman distinctiveness was merely Norman propaganda, why did the chronicle of Aelred of Rievaulx, an Englishman, distinguish the

Normans in David I's armies at the Battle of the Standard? The answer must be that those Normans were indeed viewed as an idiosyncratic people.

Normanitas in the twelfth century may still be viewed as a unity. Norman identity on the peripheries of Europe was diminishing, but the gradual diminution of *Normanitas* in the second half of the twelfth century does not invalidate its manifestations. When Normans of the north and south are viewed through a continuum of identity that allows for diversity and transformation, there is some evidence for the unity of Norman identity in Scotland and southern Italy until the latter part of the twelfth century. Despite their tendency to assimilate and adapt to local contexts in different ways, Normans in Scotland and southern Italy possessed a common military ethos as well as administrative institutions that shared a common origin in Normandy and the Anglo-Norman kingdom. Furthermore, the persistence of references to the *gens Normannorum* in the north and the south reflects the vitality of Norman identity. Even when Norman identity became virtually subsumed by the end of the twelfth century, the separate zones of the Norman Edge were united by a larger ethno-cultural phenomenon: an increasingly homogenous Western Europe, whose gradual coalescence was aided in large part by the influence of *Normanitas* on the peripheries.

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77

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