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The Long Investiture Controversy: Western Europe's Power Struggle between Church and State (494-1598)

Kieran Vrklan
Dominican University of California

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The Long Investiture Controversy:

Western Europe's Power Struggle between Church and State (494-1598)

A senior thesis submitted to the faculty of Dominican University of California in partial fulfillment of the requirements of a Bachelor of Arts degree in History

Kieran Vrklan

San Rafael, California

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ABSTRACT

Conflicts between the Catholic Church and European monarchs are nothing new. Foremost among this timeless conflict is the Investiture Controversy, beginning in 1076 due to a feud between Pope Gregory VII and King Henry IV of Germany and ending in 1122 with the Concordat of Worms. Monarchs were appointing bishops and abbots, a job meant to be for the Pope. The Concordat sought to alleviate the conflict by stating the Church had the sole ability to select the bishops and appoint abbots of monasteries. However, this crisis continued centuries after as monarchs sought to appoint, or publicly support, clergy to their court. Monarchs across Europe, such as Emperor Frederick II, Emperor Charles V, and Philip II, exemplify the church vs state power struggle. These monarchs exhibit a *what*, *why*, and *exception* in their power struggles culminating in a continued power struggle beyond that of the Investiture Controversy. Emperor Frederick II had a complex relationship with the papacy and was eventually excommunicated three times. Charles V saw the Church as vital to maintaining his empire and saw the Church as an obstacle to his growing empire. Philip II also saw the Church as an obstacle when pursuing his duty as “defender of Christendom,” and he used his prestige as a Catholic monarch to achieve his political goals. These monarchs all embody the power struggle between church and state over who holds the supreme authority in the physical world.

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INTRODUCTION

The Catholic Church, European monarchs, and the struggle for power; this is the foundation for the Investiture Controversy, beginning in 1076 and ending with an agreement known as the Concordat of Worms in 1122. Whether or not the Investiture Controversy was, as some historians say, “the single most crucial event of the entire medieval period,”¹ is debatable, but it was certainly significant when it came to medieval Church history. The Controversy set the stage for future relationships between the Catholic Church and European monarchs.

The Controversy began over the election of bishops and abbots by monarchs of the Holy Roman Empire, straining the relationship between the papacy and the European monarchs. Holy Roman Emperor Henry IV even fired Pope Gregory VII from his position as pope, prompting Gregory to respond back with the excommunication of Emperor Henry IV. This conflict eventually led to a new way of electing officials and even changed how the pope is chosen. Today, the pope is elected by cardinals, a practice which started in the 11th century. It was essentially a church vs. state conflict, where the pope and the king argued over who had the power to invest in bishops and abbots. After a few decades of conflict, the Controversy ended with the Concordat of Worms, but this was more of a temporary compromise than a permanent solution.

In the context of the Concordat, Pope Calixtus II was influential in ending the Investiture Controversy. Reigning as pope between 1119 and 1124, Calixtus engaged in talks with Holy

¹ Sandy B. Hicks. “The Investiture Controversy of the Middle Ages, 1075-1122: Agreement and Disagreement Among Historians.” *Journal of Church and State* 15, no. 1 (1973): 5–20. <http://www.jstor.org/stable/23914971>.

Roman Emperor Henry V to end the Investiture Controversy. Pope Calixtus II, in the Concordat, states “that the elections of the bishops and abbots of the German kingdom, who belong to the kingdom, shall take place in thy [Pope Calixtus II] presence, without simony and without any violence” seeking to grant some autonomy, to Emperor Henry V regarding election of bishops and of abbots of monasteries. Emperor Henry also adds to the compromise “and do grant that in all the churches that are in my kingdom or empire there may be canonical election and free consecration.”² The Concordat stated that the investiture of new bishops and abbots would no longer need to be given authority by the Holy Roman Empire and there would be an election to put them into their positions. However, there was an exception. If the election was close and there was no clear winner, then the Holy Roman Emperor decided who would win. This is problematic, because it may mean that the emperor may still have a say in who wins an election. While the Concordat did provide temporary relief to this conflict, the struggle for power remained and the church vs. state dispute carried on throughout the Middle Ages.

In this paper, the continued church vs state conflict is analyzed through the lens of three different monarchs: Frederick II, Charles V, and Philip II. Although the right to elect bishops and abbots of monasteries was the primary issue resolved in the Concordat of Worms, the procedure did not continue in the exact same way with all the different monarchs. After the Concordat of Worms was signed many monarchs still looked to elect bishops, clergy, and abbots to cement their power within Christendom. Even though most of these monarchs were Catholic up until the

² “Documents Relating to the War of the Investitures, Concordat of Worms; September 23, 1122,” Avalon Project - Documents in Law, History and Diplomacy, 2008, <https://avalon.law.yale.edu/medieval/inv16.asp>.

Protestant Reformation, these monarchs still fought to have a higher authority within Europe and the Church. Monarchs even attempted to vote for or support certain papal candidates, such as Philip II.

Using a comparative case-study historical analysis, this paper aims to provide an in depth look at the ways in which the Investiture Controversy and the conflict between church and state officials continued beyond the Concordat of Worms. The monarchs displayed a similar conflict between themselves and the papacy, comparable to the Investiture Controversy, because they all tried to invest in bishops or clergy as a means at retaining their power over the Church. All three monarchs argued with the pope in a similar way to what Holy Roman Emperor Henry IV did in the Investiture Controversy, however, the conflict was more complicated in those late years. While each monarch did have disagreements with the papacy over the right to invest in bishops, or over power struggles between the two authorities, there were also times when each monarch worked to mutual benefit with the papacy. This is an important factor when analyzing the struggle between church and state in this period. Power is an important theme when understanding this relationship because power is how the Pope and the European monarchs stayed relevant in a politically dynamic Europe. This is why the papacy and the monarchs were at odds, because when power is on the line they are fighting to keep influence. However, when it is mutually beneficial to both, whether that is fighting against heretics or advancing Church interests, then the two authorities will work together.

Each monarch during the Middle Ages, which for the purpose of this paper will be described as the period from 494 and ending with Philip II in 1598, had a unique relationship with the Catholic Church and specifically with the papacy. Frederick II, Charles V, and Philip II

continued the conflict from the Investiture Controversy, but in different ways. They argued over the *what*, wielding power in the physical world; the *why*, the justification for superiority and divine appointment to rule; and finally, there is the *exception*, where the Church and the monarchs were still willing to work together and rely on each other in some respects.

This paper will also cover the Gelasian Theory, as a contextual precedent (494), which is one of the most important Church doctrines covering the powers of church and state. Although this topic could be extensively covered separately, this paper will use a case study of three different Catholic monarchs to show how the church vs state conflict did not end at the signing of the Concordat of Worms, but instead carried on throughout the Middle Ages.

HISTORIOGRAPHY

Throughout the Middle Ages (494-1598), and leading up to Philip II, the relationship between the secular Kingship of European countries and the ecclesiastical authority of the clergy in Rome caused tensions between church and state. The histories which will be displayed below, were chosen because of the relevance to the topic.

The first article titled “The Investiture Controversy of the Middle Ages, 1075-1122: Agreement and Disagreement Among Historians”, the author discusses the agreements and disagreements between historians over the Investiture Controversy. The article was written in 1973 and uses sources up to that date to use as evidence. This article itself is a historiography and includes good insight into the differences of opinions by historians. According to the author almost all historians loosely agree that the Controversy ended because of the Concordat of Worms. The author also states that “perhaps the most impressive example of general agreement among historians is the acknowledgement that the Investiture Struggle was of vital importance in

the formation of medieval Europe.”³ Within this article, the author points out how different historians claim that the Investiture Controversy was one of the major turning points, not only in the Catholic Church and the Middle Ages but, in the politics of the world. Historians disagree on the title of this controversy as many refer to it in various ways: crisis of church and state, Gregorian reform, Gregorian revolution, and wars of Investiture for example. This article also points out that the use of the phrase “church and state” may be a dangerous phrase, since everyone in medieval Europe had ties to either the Church or one of the monarchs. This is interesting as many other historians in their work describe this as a church and state conflict, when during this period you could not have one without the other. Instead of using the Investiture Controversy as a single event, the author indicates that this was a civil war within *societas christiana*, or Christian commonwealth. Many historians agree on how the investiture controversy has influenced religious as well as political thought, meaning some legal history can be found within this controversy.

The second source is titled *The Investiture Controversy: Church and Monarchy from the Ninth to the Twelfth Century*, by Uta-Renate Blumenthal, Professor Emerita of History at Catholic University of America. This book was written in 1988 and provides insight into the Investiture Controversy as well as the relationship between certain monarchs and the papacy. This book is well researched, utilizes many primary sources and gives the best discussion on the Investiture Controversy, also providing evidence for a Long Investiture Controversy beginning with Charlemagne. The layout of the book gives historical context of religious reforms beginning with the era of Charlemagne. Blumenthal builds up the relationship between the papacy and the

³ Sandy B. Hicks. “The Investiture Controversy of the Middle Ages, 1075-1122: Agreement and Disagreement Among Historians.” *Journal of Church and State* 15, no. 1 (1973): 5–20. <http://www.jstor.org/stable/23914971>.

Holy Roman Emperor from Charlemagne to Emperor Henry V. Within the book, Blumenthal discusses three centuries worth of conflict and relationships between secular monarchs and ecclesiastical authorities, such as popes and bishops. Blumenthal also covers the interconnection between investiture and politics. By comparing the multiple conflicts in England, France, and Germany, the author gives more background on how each monarch dealt with their relationship with the pope. Blumenthal discusses that there was no clear definition of who spoke most clearly to Christ's authority, a critical point within her argument. Based on this unclear definition, monarchs and popes would always clash with who had more of a divine authority on Earth. Since monarchs received anointing at the time of their coronation, they saw themselves as defenders of Christ's Kingdom on Earth. On the other hand, the popes saw themselves as the vicar of Christ on Earth, or Christ's representative as was given originally to St. Peter. This issue was never really resolved and as a result, the ideas that formed during the Investiture Controversy, in one way or another, carried on throughout the Middle Ages and even into Early Modern Europe.⁴

In Early Modern Europe, Philip II, Emperor of Spain, believed himself to be God-sent and divine in his mission to be the "defender of Christendom." Philip's belief that God had sent him, pushed him to expand his empire in the name of God and this eventually created conflict between himself and the Catholic Church. In the book *Imprudent King: A New Life of Philip II*, historian Geoffrey Parker draws upon the vast historiography and presents a revisionist history of Philip II.⁵ Parker reviews the major political, military, and economic challenges which Philip faced during his tenure as Spanish Emperor. Many of the earliest Spanish biographies of Philip

⁴ Uta-Renate Blumenthal and Anne Marie Palagano, *The Investiture Controversy: Church and Monarchy from the Ninth to the Twelfth Century* (Philadelphia: University of Pennsylvania Press, 2010).

⁵ Geoffrey Parker, *Imprudent King: A New Life of Philip II* (New Haven: Yale University Press, 2015).

have extreme bias. In *Dichos y Hechos del Señor rey Don Felipe II, el prudente*, the author states “the Empress did not give birth to men, but angels” in reference to Philip’s birth and that Philip was named because he had “strong, indomitable and robust hands, such were those of this prudent king.”⁶ This hyperbolic language shows the bias this author had towards Philip and can explain why many historians who were tasked by the King of Spain in the 16th and 17th centuries, had a favorable bias toward Philip. In Parker’s book, he discusses the relationship between Philip and the papacy. Philip’s efforts had “offended and alienated the papacy” and eventually Gregory XIII declared that no lay person could preside over any future provincial councils.⁷ Related to investiture, Philip had personally selected bishops and abbots in Spain, Spanish America, Sicily, and Naples. This right was known as *patronato real*, and so whenever there was an opening in a clerical position, Philip capitalized and vouched for these clergy through ambassadors to the pope. Parker’s work is arguably the biographical best work on Philip II.

Another prominent article related to Philip II and his relationship between the pope and himself is laid out in “Philip II and the Papacy.”⁸ In the article, the author discusses how the relationship between Philip and the popes during his reign, involved more conflict than cooperation and “[the conflict] was over two main issues, ecclesiastical jurisdiction and foreign policy.”⁹ This article was written and seems to be the most comprehensive and in depth analysis of Philip II and his relationship with the papacy prior to Parker. The importance this article plays

⁶ Porreno, Baltasar, *Dichos y hechos del señor rey Don Felipe II, (el prudente)*. Potentísimo y glorioso Monarca de las Españas y de las Indias, Alicante : Biblioteca Virtual Miguel de Cervantes, 2005, <http://www.cervantesvirtual.com/nd/ark:/59851/bmcpr7q7>

⁷ Geoffrey Parker, *Imprudent King: A New Life of Philip II* (New Haven: Yale University Press, 2015).

⁸ J. Lynch. “Philip II and the Papacy.” *Transactions of the Royal Historical Society* 11 (1961): 23–42. <https://doi.org/10.2307/3678749>.

⁹ *Ibid.*

in the broader scope of history is that it provides insight into this relationship and has been cited by many authors when they write on Philip or on the popes during this time. Philip had a hunger for power and despite his devotion to the church he could not resist the temptation to take advantage of this power for political and economic ends.

Europe in the High Middle Ages, by William Chester Jordan includes a chapter on the Investiture Controversy.¹⁰ This chapter, “The Investiture Controversy”, covers the effect this ecclesiastical and secular political affair had on the Middle Ages. The author states that the Holy Roman Emperor, Henry III, “was essentially and irredeemably laical with regard to the Church.”¹¹ This description was what started the Investiture Controversy in the Middle Ages. Henry III had appointed four popes during his reign and each pope served him loyally. After Henry III had died, the papacy had denounced laymen’s investiture of clerics with churches. This chapter discusses the overarching topic of investiture along with individual popes and monarchs which are involved. The author poses many rhetorical questions within the chapter and even uses the biblical arguments some monarchs used to be granted with more spiritual and Earthly power. Since these monarchs believed that they were divine, this allowed them to try and appoint their own bishops and even popes who in exchange for their appointment, pledged loyalty to the crown. Such is the case with Henry III and his investiture with multiple popes during his reign. There seems to be little, if any, bias within this source and tries to give the best description of the event as possible.

After reviewing these sources, the argument that the conflict between church and state never fully went away holds true. These historians either look at a continuation of the

¹⁰ William Chester Jordan, “The Investiture Controversy,” in *Europe in the High Middle Ages* (London: Penguin Books, 2002), pp. 85-99.

¹¹ Ibid.

Controversy or they focus more narrowly on the Controversy. Even with the Concordat of Worms being signed, Kings had continued to try appointing bishops and even popes to gain a stronger position within the Church. Many monarchs even sacrificed their reputation within the Church to be granted more secular authority. This relationship between ecclesiastical and secular authorities carries on centuries after the Concordat of Worms sought to alleviate the controversy. Many popes and monarchs have a rocky relationship unless it is for the benefit of both parties, such as defeating heretics and fighting the Crusades. Often, these powers see the other as a barrier to achieving God's plan.

BACKGROUND

Emperor Augustus

As historians, it is important to understand the cyclical nature of human relations. A central theme in these relations is the idea of a monarch being seen as "divine." In many instances, having this status as a divine leader can solidify the monarch's power and help them influence a population which is desperate to believe in something above the physical world. An example of this would be Emperor Augustus during his time as Roman Emperor.

Augustus, also known as Octavian (63 BC-14 AD), had gone to war against Pompey in the War of Actium (32-30 BC). After this bitterly fought civil war, Augustus gained tremendous power within the newly established Roman Empire. Given that Augustus gained this tremendous power he saw that the only way to establish himself in history was to create a divine aura around himself and his leadership. After witnessing the popularity Julius Caesar received, Augustus was

determined for his people to see him as their supreme spiritual leader.¹² By doing this, Augustus sought to mix the spiritual with the physical. It is interesting that Augustus, already having the title of Caesar, additionally desired an expression of spiritual power in the physical world. Relating back to the idea of being chosen by God, Augustus, predating the establishment of the Catholic Church in 33 AD, embodies the idea of a ruler appointed by a divine force.

Once Augustus decided he would be seen as a supreme spiritual leader, he went on a mission to restore past norms and values, seeking to make Rome great again. In 12 AD, he made himself the *Pontifex Maximus*, chief priest of Rome. According to historian Alan Cameron “following the example set by Augustus, Roman emperors attached great importance to the office of *pontifex maximus*, vastly expanding...its traditional powers and purview.”¹³ Alan Cameron explains how important Augustus was in setting up the idea of mixing divine with physical power, something which will be seen when discussing the Holy Roman Emperors Frederick II and Charles V. The position of Pontifex Maximus was the early Roman Empire’s version of the Pope of the Catholic Church, but instead of Catholicism the Pontifex Maximus was head of Roman paganism. By making himself the Pontifex Maximus, Augustus solidifies himself as a divine ruler in a physical world. Merging the physical and divine authorities together, he holds complete power and is seen by his people as a god. Upon his death Augustus was seen as a “son of a god.”¹⁴

¹² “The Roman Empire: In the First Century. The Roman Empire. Religion in Ancient Rome . Augustus,” PBS (Public Broadcasting Service), accessed April 25, 2022, https://www.pbs.org/empires/romans/empire/augustus_religion.html.

¹³ Alan Cameron. “The Imperial Pontifex.” *Harvard Studies in Classical Philology* 103 (2007): 341–84. <http://www.jstor.org/stable/30032227>.

¹⁴ Nina C Coppolino, “Augustus (31 B.C. - 14 A.D.),” Roman Emperors - DIR Augustus, 1998, <http://www.roman-emperors.org/auggiex.htm>.

The merging of the divine and the physical, beginning with the Roman Emperors, shows the development of the relationship between monarchs and the Catholic Church. The abuse, or use, of power by monarchs is why Frederick II, Charles V, and Philip II, all see themselves as above the divine institution of the Church. By seeing themselves as divinely appointed by God, these monarchs question, through their actions, the authority of the Catholic Church. In the next section, the paper will cover the Gelasian Theory and the first document establishing the authority of the Church over the Roman Emperors, a precursor to the Investiture Controversy.

Gelasian Theory

Before analyzing the different monarchs and their respective relationships with the papacy, it is important to cover the Gelasian Theory (494) as historical precedent for the Investiture Controversy and future church vs. state conflicts. Gelasian Theory is derived from a letter sent to Anastasius Augustus from Pope Gelasius I in 494. In the letter, Pope Gelasius distinguished between the two main powers “by which this world is mainly ruled: the sacred authority of pontiffs and the royal power.”¹⁵ Gelasius goes on to state, “there are two [powers], august Emperor, which hold first place in ruling this world, namely the sacred authority (*auctoritas sacrata*) of the priests and the royal power (*regalis potestas*),” showing that the two authorities are not separate but share the ruling power of the Christian world.¹⁶ Gelasius also acknowledges that Augustus is “permitted honorably to rule over humankind, yet in divine matters you bend your neck devotedly to the bishops.”¹⁷ Gelasius is showing that Augustus has

¹⁵ “Letter of Pope Gelasius to Anastasius Augustus (494),” [Http://www.web.pdx.edu/~ott/Gelasius/index.html](http://www.web.pdx.edu/~ott/Gelasius/index.html), accessed May 1, 2022, <http://www.web.pdx.edu/~ott/Gelasius/>.

¹⁶ Ibid.

¹⁷ Ibid.

authority when it comes to earthly matters, but not when it comes to divine authority. Gelasius treads lightly when he is writing to Augustus, because of the earthly element of control and military power of Augustus.

This letter could be one of the most significant documents displaying the church vs state dynamic. Gelasius' letter, and the subsequent Gelasian Theory, was one of the primary parts of the original Investiture Controversy. Gelasian Theory shows that the secular authority is inferior to the priestly authority of the pope and the clergy. Gelasius states that since Augustus bends down to bishops in pursuit of salvation, therefore secular authority is inferior.

The Gelasian Theory is helpful when analyzing Early Modern Western monarchs and their relationship with the Catholic Church. It may help explain why the two powers either get into an argument or come together. When the two powers work together, if it is to advance Catholicism in general, then it is mutually beneficial to both; because the pope can spread his influence and the monarchs can be granted clemency for assisting the papacy. This theory will help with comprehending why the two powers, secular, and ecclesiastic, engage in arguments or work together, or can at least help explain the Church's viewpoint in such matters.

MONARCHS

Frederick II

Frederick II, Holy Roman Emperor from 1220 to 1250, had a very confusing and strained relationship with both the Catholic Church and the papacy. Frederick became involved in the Fifth (1217-1221) and Sixth Crusades (1228-1229) and came away from them believing he had more power than the Catholic Church. In his mind, Frederick saw himself as a revival of the

Roman Emperors of antiquity, with a divine and supernatural aura.¹⁸ Even though Frederick himself was a devout Catholic, the papacy to him was an obstacle to spread his influence and further develop the influence of the state. The conflicting view of church vs state is the basis for Frederick's competition for power with the pope. Frederick was the monarch who advocated for the right of the state to exist independently of the Catholic Church, hence Frederick's opposition to the papacy.¹⁹ Because of this strained relationship, Frederick was even excommunicated from the Church. This section of the paper is going to analyze Frederick's *what*, *why*, and his *exception*. Frederick was an enigma when it came to this relationship because of his inability to give into the pope's demands while at the same time using the pope as an ally to get rid of heresy within the state and within the Church.

Frederick II's *what* was the argument with the papacy over the right of the state to exist independently from the Church. Frederick had been a ruler during the tenure of a few different popes: Pope Innocent III, Pope Honorius III, Pope Gregory IX, and Pope Innocent IV. The first two popes, Innocent III and Honorius III, were concerned over Frederick's control of Europe as well as his control of Sicily and the Sicilian Church. Frederick's policy regarding the Sicilian Church was to recover possessions belonging to the crown before the death of William II.²⁰ William II was the King of Sicily from 1166 to his death in 1189, and who was, ironically, a champion of the papacy. Frederick ordered an edict in which land was to be given back to the crown. Land repossession in Sicily was a very likely power grab by Frederick and put pressure

¹⁸ Roberto Weiss, *The Renaissance Discovery of Classical Antiquity* (New York: ACLS Pod, 2010).

¹⁹ James M. Powell. "Frederick II and the Church: A Revisionist View." *The Catholic Historical Review* 48, no. 4 (1963): 487–97. <http://www.jstor.org/stable/25017141>.

²⁰ H. J. Pybus. "The Emperor Frederick II and the Sicilian Church." *Cambridge Historical Journal* 3, no. 2 (1930): 134–63. <http://www.jstor.org/stable/3020704>.

on the papacy. In reclaiming land, Frederick aims to try and create the separation between church and state. Frederick, as a physical ruler, is seeking to cement his power and sees the repossession of land as an aid in this endeavor. These actions represent an important issue in the church vs state conflict, and will be revisited with Philip II, where he also surrounds the Papal States by placing dominions in strategic positions. Frederick does this to retain a strategic position and to force the pope's hand in recognizing him as Holy Roman Emperor and as above the Church in terms of power.

Frederick's *why* is about the justification for how he saw himself above the papacy regarding power in the physical world. Originally, Frederick was favored by the papacy because he promised to embark on a crusade. Pope Honorius III originally pushed Frederick to go on a crusade because this would take some unwanted pressure off the Papal States. Frederick promised to go on the crusade, but eventually did not go with the armies and instead stayed behind while the armies marched toward Egypt. The Fifth Crusade had ended in disaster and Pope Honorius blamed Frederick for the defeat.²¹

After Honorius' death a new pope was elected, Pope Gregory IX. Frederick again declared he would go on a crusade but once again delayed his departure. This time, he was struck ill, and Frederick's army had to go ahead of him again. In 1227, Pope Gregory IX eventually excommunicated Frederick for not honoring his promise to embark on a crusade. Frederick's illness was part of an epidemic taking place within Europe, and Pope Gregory could have unfairly excommunicated him because of these external circumstances. Some historians also

²¹ César Auguste Horoy, *Medii Aevi Bibliotheca Patristica* (Paris: Imprimerie de la Bibliothèque ecclésiastique, 1879).

doubt the validity that Frederick's illness was real, thus creating the idea Frederick was manipulating the papacy to show his power over them. However, this "illness" may not have been the cause of him staying behind during the Fifth Crusade. According to Roger of Wendover, a chronicler of the time, "he said that he was seized with a sudden illness... this conduct of the emperor redounded much to his disgrace, and to the injury of the whole business of the crusade,"²² displaying the idea that Frederick may not have suffered from illness, but instead wanted to display his power over the pope. Frederick was still trying to gain his foothold as Holy Roman Emperor, something which surely infuriated Pope Gregory. Frederick possibly was showing the Church that he would only go on a Crusade on his terms. By doing this, he could be showing the papacy that he is above them because he has the power and the army which would be needed to embark on the crusade, making it so that everything is under Frederick's control. Nonetheless, this was a strange instance. Frederick chose to embark on a crusade, something in which popes usually are pleased at, because it allows for the Holy Land to be reclaimed by Christians. Frederick did also have a claim to Jerusalem already and so there is the possibility he was fighting for more power within the region. However, because of Frederick's "illness," Pope Gregory most likely saw this as blatant disrespect from Frederick. This tense situation led to more disagreements between Frederick and the papacy.

There are, however, moments where the two parties do not get along. When it came to bishops and abbots, there were many posts which were not filled because of Frederick.²³ While

²² As found in, Edward Peters, "Christian Society and the Crusades, 1198-1229," Internet Archive (Philadelphia, University of Pennsylvania Press, January 1, 1971)
<https://archive.org/details/christiansociety0000pete>.

²³ Gregory IX on Frederick's excommunication (1239)

this was cause for concern, it helps illustrate the idea that the conflict found in the Investiture Controversy did not end 100 years earlier, rather it continued.

In 1228, Frederick embarked on the Sixth Crusade. The pope viewed this as Frederick trying to provoke or make the pope upset, resulting in a second excommunication—something unheard of in the Catholic Church. This double excommunication supports the idea that Frederick had a particularly rocky relationship with the pope, a church vs state conflict. Frederick even promised and eventually embarked on a crusade, something past popes would be grateful for. But Frederick was seen as a threat to Pope Gregory, leaving him with no choice but to excommunicate.

Frederick's crusade even resulted in his coronation as King of Jerusalem, receiving his title as King through his marriage to Isabella II of Jerusalem. The city eventually fell to Muslim reconquest. As King of Jerusalem, Frederick strengthened Christian influence within the Holy Land; but what is most interesting, is that Frederick only reclaimed Jerusalem through negotiations, not through warfare. Frederick's *why* and justification for his battle with the papacy did not end with Pope Gregory. After Gregory died in 1241, Pope Innocent IV replaced Gregory as pope. Originally, Frederick saw Pope Innocent as a potential ally, but over time realized that this was not possible. Pope Innocent would eventually excommunicate Frederick for a third time. Innocent had declared Frederick's third excommunication when he summoned the Council of Lyons. Pope Innocent in his encyclical declaring Frederick's excommunication states, "he has committed four of the greatest gravity, which cannot be hidden by evasion."²⁴ These crimes

²⁴ "First Council of Lyons – 1245 A.D.," Papal Encyclicals, December 12, 2017, <https://www.papalencyclicals.net/councils/ecum13.htm>.

committed by Frederick severed the peace between his state and the Catholic Church. He committed sacrilege by arresting cardinals, prelates, and clerics of other churches, both religious and secular, who were coming to the council which Pope Gregory invested in. He was also suspected of heresy. All these issues relate back to the idea that the Investiture Controversy never truly ended.

Even though Frederick and the papacy were at odds during Frederick's reign, there are *exceptions* to their power struggle. Gregory, to Frederick, was an obstacle in the way of Frederick's desire to keep the state completely autonomous and separate from the Church. By keeping the state autonomous from the Church, Frederick could create a new Roman Empire, with himself divinely appointed to rule over it. However, there were certain things the two leaders agreed on. Frederick was a staunch opponent of heresy and saw heresy not only as a crime against the Church but also as a crime against the state. In legislation laid out by Frederick and from his instructions to officials, Frederick worked closely with the Church to eliminate unorthodox beliefs.²⁵ This will be a theme which will be touched upon in the case of the other monarchs as well. It seems that many times the monarchs and the papacy do not get along, but there are also instances in which they work in unison.

Frederick had one of the most strained relationships with the papacy, not only in the Middle Ages, but in all European history. By analyzing Frederick's relationship, one can see that the idea that the Investiture Controversy did not really end. Central to the Investiture

²⁵ James M. Powell. "Frederick II and the Church: A Revisionist View." *The Catholic Historical Review* 48, no. 4 (1963): 487–97. <http://www.jstor.org/stable/25017141>.

Controversy is the disagreement over the right to invest bishops and abbots, a problem that came up during Frederick's reign as well. Frederick's relationship with the papacy reveals that the church vs state conflict continued. He was excommunicated multiple times, including once for going on a crusade, something that Pope Honorius III and Pope Gregory IX had wanted him to do. Even though he was seen as a threat by the papacy it is important to note Frederick's importance in the Middle Ages. Historian Thomas Asbridge states that "he was lauded by supporters as *stupor mundi* (the wonder of the world), but condemned by his enemies as 'the beast of the apocalypse'" and "by the 1220s, he was the Christian world's most powerful ruler."²⁶ The people living under Frederick saw him as the "wonder of the world" and it would be safe to say that the papacy saw him as "the beast of the apocalypse." However, Frederick's influence in both the Middle Ages and within the church vs state conflict is cemented, and his success was when he was able to jostle the papacy around so he could keep his status as the top ruler in the physical world.

Charles V

Charles V, reigning as Holy Roman Emperor and King of Spain from 1516 to 1556, displayed many different angles of his relationship between himself and the papacy. During his reign, multiple significant historical events took place: the Protestant Reformation, the Council of Trent (1545-1563, was a major ecumenical council described as an embodiment of the Counter-Reformation),²⁷ Ottoman advances, and wars with France. Even though Charles was at

²⁶ Thomas Asbridge, in *The Crusades: The War for the Holy Land* (Simon & Schuster LTD, 2020), p. 563.

²⁷ "Trent, Council of" in Cross, F. L. (ed.) *The Oxford Dictionary of the Christian Church*, Oxford University Press, 2005

odds with the papacy, he too experienced *exceptions* in which he agreed with the pope. Charles helped the pope sign the Diet of Worms, declaring Martin Luther an outlaw in the eyes of the Church due to his 95 theses and involvement in starting the Protestant Reformation. Charles had to juggle this and his other interactions with the papacy. “Despite being a devout Catholic Charles V was acutely conscious of Papal power and it was in his interest for the Vatican to be destabilized.”²⁸ Charles believed that the Church was sometimes a distraction from his ability to spread Spanish influence throughout his vast empire. The papacy and Charles were at odds when it came to certain events as well. Like Frederick, Philip worked with the papacy to rid Europe and the Church of heretics and “enemies” of the Catholic Church. Pope Leo X, however, was intent on going to war with Charles. This section of the paper will analyze Charles' *what*, *why*, and *exceptions* in his relationship with the Catholic Church.

Charles' *what* involved his need to solidify his power in the physical world. Charles' empire was the largest Catholic empire on the planet, described as “the first upon which the sun never sets.”²⁹ One of the biggest examples of Charles' disagreements with the papacy comes during the Sack of Rome (1527). Prior to this, Pope Clement was concerned about Charles' power and how he was spreading his empire throughout Europe. Clement thought Charles would eventually be too powerful and have too much control over Italy, ultimately controlling the Papal States. The main point of contention was that of physical power immediately surrounding the home of the papacy, should the papacy itself or a “foreign power control the surrounding

²⁸ “Martin Luther. The Characters. Charles V,” PBS (Public Broadcasting Service, 2003), https://www.pbs.org/empires/martinluther/char_charles.html.

²⁹ Jonathan Holslag, *A Political History of the World: Three Thousand Years of War and Peace* (Pelican an imprint of Penguin Books, 2019).

land?"³⁰ Pope Clement's concern about Spain gaining too much power in Europe prompted Clement to form the League of Cognac. The League of Cognac consisted of Pope Clement, Francis I of France, the Republics of Venice and Florence, and the Duchy of Milan. Clement formed to fight against Charles and take back Italy and the Papal States. Charles did not directly tell his army to attack Rome, but many of his soldiers were disgruntled mercenaries, unhappy because they were not getting paid. This caused them to travel to Italy and attack in the Papal States. Pope Clement surrendered and ceded a lot of territory to Charles. Charles was slightly upset and embarrassed at the fact that he did not have full control over his troops; however, the result gave him further leverage against an aggressive pope.

Like the other monarchs, Charles sought to expand his authority within the Church. Charles' *why* was that Charles believed that the Church was an obstacle in his way of expanding his empire. Charles also saw it as in his best interest to destabilize the papacy and to do so he needed to find clergy in favor of himself. Therefore, Charles invested in bishops that favored the Spanish monarchy. This mirrors the conflict of the Investiture Controversy since Charles engaged in disagreements with the papacy and other monarchs. Charles controlled the clergy, because he transferred them into the control of benefices, which is a permanent Church appointment where money and property are provided in exchange for work.

At times, Charles needed the help of the Church, and the pope was willing to work with him, creating *exceptions* to the power struggle. One such *exception* when the papacy worked

³⁰ Martin Spahn. "Emperor Charles V." *The Catholic Encyclopedia*. Vol. 3. New York: Robert Appleton Company, 1908. 10 Mar. 2022<<http://www.newadvent.org/cathen/03625a.htm>>.

with Charles, although not perfectly, was during the Council of Trent (1545-1563). The Council of Trent was one of the most influential and important councils to take place within the Church.³¹

The Council was the official counter to the challenges on Church doctrine posed by Martin Luther and the other Protestants. The Council was important, because it established doctrine, addressing what was previously unclear, and helped revitalize the Catholic faith in Europe, ultimately playing an important role in the Counter Reformation.³² After the Council concluded, the Church was in a much more solid place theologically and it established the Church's primary form of the Mass, the Tridentine Mass, which was used for the next four hundred years.

Nonetheless, Charles had played a minor but important role in the Council.

When analyzing Charles, it is important to historically contextualize the time of his reign. Many revolutionary ideas, movements, and shifting power structures within Europe marked his reign. New to his position as Holy Roman Emperor, Charles needed a strong will and intelligent utilization of all his resources. For Charles to expand Spain's influence across Europe and within the Church, he needed to work with the papacy. One such issue was the handling of the Protestant Reformation and Martin Luther.

During the Protestant Reformation, a notable *exception*, Charles helped draft the Diet of Worms. The Diet of Worms (1521) was an imperial diet with the goal of having Martin Luther defend his 95 theses. During the diet, Luther refused to defend and explain his theses leading Charles to declare war against Protestantism. Ultimately, Luther was pronounced a heretic and

³¹ Bruce Wetterau, *World History: A Dictionary of Important People, Places, and Events, from Ancient Times to the Present* (New York: H. Holt, 1995).

³² "Council of Trent," Council of Trent - New World Encyclopedia, accessed March 14, 2022, https://www.newworldencyclopedia.org/entry/Council_of_Trent.

his teachings were banned throughout Europe. In this situation, Charles worked closely with the Church to fight against heresy, a major threat to both of their empires. With Charles' help, the Church navigated arguably the biggest threat to their existence and with the church's help, Charles V persevered through arguably the most significant threat to his control over Europe.

Prior to the conclusion of the Council of Trent, and after the death of Luther, Pope Paul III and Charles entered into an agreement. This agreement stated that Charles would go to war with anyone who opposed the Council. The main opposition to the council was the Schmalkaldic League, a group of German princes who supported Luther and agreed to mutual defense. Charles eventually defeated the Schmalkaldic League, prompting him to issue a temporary religious settlement against the Lutherans.³³ This settlement, known as the Augsburg Interim, was Charles' attempt to contain Lutheranism and was used as a temporary solution before the conclusion of the Council of Trent. This example once again illustrates the concept of a monarch and the papacy working together. Charles could easily have avoided war against the Germanic princes; but this was a situation where the papacy and Charles would both benefit. Historian H.G. Koenigsberger states it very well when he illustrates Charles' mission: "Charles saw his task as the divinely appointed one of leading a united Christendom against the external enemy, the Muslim Turk and, later, against its internal enemies, the Lutheran heretics."³⁴ This divine mission is what prompted Charles to undertake certain cooperative endeavors with the papacy, since spreading Christian and Spanish dominance throughout Europe was a principal thought in

³³ Jack Kilcrease, "The Augsburg Interim," Lutheran Reformation, May 12, 2016, <https://lutheranreformation.org/history/the-augsburg-interim/>.

³⁴ H. G. Koenigsberger. 1971. *The Habsburgs and Europe, 1516-1660*.

both Charles' and the pope's mind. This same ethos holds true for Charles' son, Philip II, as well. Philip also saw himself as the "defender of Christendom," with the aim of eliminating heretics and growing the Spanish empire.

Charles' vision of a vast Spanish and Christian empire explains his aggressiveness towards conquest and power; but these ambitions are also what caused him so much trouble with the papacy. Nevertheless, there were a handful of times where the papacy and Charles worked together. The church vs state conflict in this case of Charles V was both mutually beneficial and violent. The pope went so far as to try and attack Charles by allying with other Catholic monarchs in Europe. While the right to invest in clergy was not the central point of this case study, the point of trying and getting a favorable position in the Church holds true. The pope sought to take down Charles by allying with Francis I of France, something which would be ideal for Francis because he could have more French influence within the Church allowing him more power. Overall, Charles V helps prove the idea that the power struggle between church and state had continued throughout the Middle Ages.

Philip II

Another of the most influential figures of the Middle Ages would be the King of Spain and inheritor of Charles V's empire, Philip II. Although Philip did not have a strained relationship with the papacy like Frederick did, it was rocky at best. Philip's reign was filled with threats. The Protestant Reformation had already begun under his father, Charles V, and was spreading throughout Europe, threatening the power and influence of the Catholic Church. The Reformation caused great tensions between monarchs of the different faiths, most notably

between Philip II, a Catholic, and Queen Elizabeth, a Protestant. The rise of the Counter-Reformation within the Church caused Philip to develop an almost godly aura around himself. These external factors and his royal pedigree prompted Philip to believe he was destined for something bordering on the divine, like his father Charles V. Philip saw himself as the “defender of Christendom” or the last bastion of Catholic civilization in Europe. This section of the paper will analyze Philip II’s *what*, *why*, and *exceptions* regarding his relationship with the papacy.

Philip argued constantly with every pope during his reign, aiming to use his power to solidify his position above the papacy. Philip did not have a close relationship with all the popes present during his reign, but he sought to make amends or develop a bond with each pope. Sometimes, however, Philip and the popes did not get along. Many viewed Philip as not having the Church’s best interests in mind. Philip’s *what* involved seeing himself as the “defender of Christendom,” inheriting his father’s vast Spanish Empire. The popes had considered that Philip used the prestige of being a Catholic monarch to achieve goals which were essentially political.³⁵ His political goals, however, were to advance himself, and Spain, as the ideal Christian state. Philip sought to expand the Spanish Empire into a new Rome, and he did this by using highly leveraged campaigns and his status as a Catholic to justify his attempts to recreate the glory of Rome.

Philip was engaged in a power struggle with the papacy because he saw himself as the “defender of Christendom,” the central facet of Philip’s *why*, causing Philip to see the pope as an obstacle to his ultimate goals. Philip used his power as Holy Roman Emperor to eventually order dominions to surround the Papal States, a clear and direct threat to the papacy. As historian John Lewis Gaddis points out, Philip was a “hedgehog,” meaning he sought the big picture instead of

³⁵ J. Lynch. “Philip II and the Papacy.” *Transactions of the Royal Historical Society* 11 (1961): 23–42. <https://doi.org/10.2307/3678749>.

focusing on the little details.³⁶ In Gaddis' eyes, Philip was so determined in his pursuit to expand the Spanish Empire that he often did not look at the little details. Philip was swamped with decisions, such as handling the empire's finances, while also engaging in many conflicts, like the Battle of Lepanto, on his way to expanding the Spanish Empire. An obstacle to his path was the pope himself.

Philip sought to change multiple different policies within his Empire like his father. For example, the crown's right "to provide bishoprics and abbeys was... a protective measure against the abuses of the papacy," and Phillip cutting off ecclesiastical benefices was able to "exercise a stranglehold on the personnel of the church."³⁷ These protective measures helped Philip support his *why*, since providing bishops allows for Philip to keep his power above the papacy. This emphasizes how the church vs state conflict was a power struggle relating back to the Investiture Controversy. By having a control over the investiture of clergy, Philip can hold power over the papacy.

When it came to the Church, Philip could be very skeptical. Pope Pius V wanted to make sure that Philip would accept and abide by all the Church's new rules. Philip also wanted to make sure he had power. Philip engaged in a quick, quiet war during his reign, guaranteeing Spanish hegemony in Rome. This war, known as the Caraffa War, showed Phillip that the papacy was the linchpin to stability or instability on the eastern front of Spanish dominions.³⁸ The war between the Spanish monarchs and the papacy was not new. As seen previously, Charles V did have his disagreements with the papacy as well, even though he wanted to

³⁶ John Lewis Gaddis, *On Grand Strategy* (London: Penguin Books, 2019).

³⁷ J. Lynch. "Philip II and the Papacy." *Transactions of the Royal Historical Society* 11 (1961): 23–42. <https://doi.org/10.2307/3678749>.

³⁸ Thomas James Dandeleat. "THE ROMAN WORLD IN THE AGE OF PHILIP II." In *Spanish Rome, 1500-1700*, 53–108. Yale University Press, 2001. <http://www.jstor.org/stable/j.ctt1npr0m.9>.

maintain a proper relationship with the Church. Eventually, the Spanish had won this Caraffa War beginning a period of influence which had not been seen before in Rome.³⁹

During Philip's reign, there were *exceptions* where Philip and the popes worked together to prevent the spread of heresy and address threats against the Catholic Church. Philip was an ardent supporter, and arguably, promulgated the Church's Counter-reformation. Philip denounced Protestantism as heresy and worked with the Church to eliminate this heresy. Philip even entered into a tense negotiation period, where he and the papacy argued over the fate of the *bula de la cruzada*, which was a crusading indulgence granted to monarchs of the Iberian Peninsula since the Middle Ages.⁴⁰ This part of Philip's relationship with the pope is important to analyze. Philip saw the papacy as either a hindrance to his ability to spread Christianity and spread the influence of the Spanish Empire, or as an ally in which he could take advantage to further his influence. Philip and the papacy got along when it was in each other's best interest and were at odds when it was seen as only in Philip's best interest.

Another *exception* when Philip and the Church worked together was during the election of Pope Pius VI in 1775. The powerful Spanish Empire, under Philip V, worked very hard to try and have complete control over the election.⁴¹ Having influence within the Church was beneficial to the Spanish because the ability to elect clergy and abbots was seen to combat the abuses of the papacy. However, if the Spanish had the ability to have influence in papal elections, then the Spanish would eliminate all papal abuses against them. After the death of Pope Pius VI in 1775, there was a need to have a papal conclave, a gathering of the College of

³⁹ Ibid.

⁴⁰ Patrick J. O'Banion. "The Crusading State: The Expedition for the Cruzada Indulgence from Trent to Lepanto." *The Sixteenth Century Journal* 44, no. 1 (2013): 97–116. <http://www.jstor.org/stable/24245246>.

⁴¹ Thomas James Dandeleet. "THE ROMAN WORLD IN THE AGE OF PHILIP II." In *Spanish Rome, 1500-1700*, 53–108. Yale University Press, 2001. <http://www.jstor.org/stable/j.ctt1npr0m.9>.

Cardinals of the Catholic Church to elect a new pope. Once this conclave met, a courier from Spain had arrived in Rome, the rumor flew around the city and the Conclave that King Philip II had endorsed the candidacy of Cardinal Ghislieri, the future Pope Pius V.⁴² Philip endorsing and helping Pius V ascend to the position of pope cemented Spanish influence within the Catholic Church, creating a mutually beneficial relationship.

After Pius V and Gregory XIII reigned as pope, Pope Sixtus V was elected in 1585. In 1587, with the rise of Protestantism in England, Mary Queen of Scots had been executed, and Queen Elizabeth of England was seeking power Elizabeth, a protestant, created many problems for Philip and Pope Sixtus. Despite what was happening in England, Pope Sixtus was seen as having an aversion to Philip; the two parties disliked each other. Ultimately “the pope could not oppose Philip’s attack on England,” known to history as the Battle of the Spanish Armada, and “he could not ignore the interests of Catholicism.”⁴³ The interests of Catholicism, to the pope, is the top priority, and even though Philip may or may not have had Catholicism's interest first, the papacy could not intervene. Protestants were seen as heretics, and Philip’s quest to take both England and fight Elizabeth was seen by the Church as being a duty. This situation represents the idea that the papacy and Philip did not get along and even though the internal and external events happening regarding England, the pope was not interested in getting in Philip’s way.

Philip’s relationship with the papacy is ideal to analyze. Since Philip’s reign was during the height of the Spanish Empire, the papacy and the Catholic Church were heavily involved. This led the way for different conversations and events to take place between Philip and the Church. When it was mutually beneficial to both entities, such as when the pope told Philip he

⁴² Prof. John P. Adams, “Sede Vacante 1565-1566,” Sede Vacante 1565-1566, October 26, 2015, <http://www.csun.edu/~hcfll004/SV1566.html>.

⁴³ J. Lynch. “Philip II and the Papacy.” *Transactions of the Royal Historical Society* 11 (1961): 23–42. <https://doi.org/10.2307/3678749>.

was the rightful heir to the English throne, then the relationship was good. When it was not good, which happened when Philip was viewing the Church as an obstacle and decided to encircle and entrap the Papal States, then the relationship was in a bad position. Nonetheless, the example of Philip helps prove the idea that the church vs state conflict carried on throughout the Middle Ages.

CONCLUSION

The church vs state conflict is a topic which is relevant even into the modern era. Given that this topic is so important to the relationship between secular authorities and the Catholic Church, a divine institution, it is necessary to be able to understand it. Organized religion, and the church vs state conflict, is a timeless conflict throughout world history. The Gelasian Theory set the stage for church vs state conflict during a period between Late Antiquity and the Middle Ages. During a period where Christianity was the state religion of the Roman Empire, Pope Gelasius made a bold move when he wrote a letter to Emperor Anastasius, claiming that secular authority was inferior to the divine authority of the papacy. The conclusions drawn in this paper are that these conflicts are due to the most powerful monarchs of their times seeing themselves as appointed by God. These monarchs also used the Church and the papacy as a political tool to achieve their goals in the physical world. One of the central ideas discovered in this paper is the power struggle between church and state over who has the supreme power on Earth. After reviewing the sources and through the case-study methodology, it is proven that the Investiture Controversy did, in fact, continue beyond the agreement of the Concordat of Worms

The introduction of Gelasian Theory created the modern church vs state conflict covered in this paper. The Investiture Controversy stemmed from this in that the right to invest in

bishops, abbots, clergy, and even the pope himself, was debated to figure out who had the right to do so. The Concordat of Worms attempted to end the Investiture Controversy by creating a sort of compromise but was not successful. Following the Concordat was a period of not just conflict between the church and state, but conflict on a large scale in Europe and the Middle East with the growing threat of Islam to the Catholic Church as well as the threat of heretics, internal schism, and war.

These external conflicts further exacerbated the conflict between church and state because these monarchs needed to find ways to keep and solidify their power. By seeking to create a divine aura around their leadership, they establish themselves as benevolent rulers to be followed and supported. The relationship between the two authorities became strained since the papacy wanted to keep its position as a power on the world stage, the legitimate divine institution, without being used as a political tool by European monarchs. The monarchs covered in this paper utilized the papacy as a political tool and even created ways to control the Church. Charles and Philip are examples where this happened because to control and keep the papacy controlled, each monarch encircled the Papal States and strategically placed their dominions.

Some popes even use monarchs to fight against other monarchs. This causes a situation where one monarch gains an advantage within the Church, which ultimately could end up with the monarch, who is favored, having the authority to invest in clergy, the same thing causing the Investiture Controversy. Francis I of France coordinated with Pope Clement VII to fight back against Charles, an event which backfired against the powerful French king and his papal supporters. Charles became even more powerful and thus became widely influential within the Catholic Church to the point where he helped shape the policies in the Council of Trent.

It seems that the overall church vs state conflict is a power struggle between earthly institutions and the divine institution. While there have been multiple attempts for reform, the most notable one being the Investiture Controversy, the conflict has continued. The Investiture Controversy, concluding with the Concordat of Worms, had happened during a period where the two authorities should have been working in cooperation to create an ideal life upon Earth. This did not happen, and the Investiture Controversy could have made the conflict worse. Each monarch analyzed who reigned after the Investiture Controversy shows a strained relationship with the papacy, unless otherwise beneficial. Frederick II was excommunicated multiple times, Charles V was attacked by an alliance between a rival monarch and the pope, and Philip II even cut off pay to clergy to keep power over the Church. All these men pursued power in the name of God, and in doing so created a conflict with what is supposed to be God's institution on Earth. They went against the Gelasian Theory and created a conflict which could have been solved if properly followed upon the signing of the Concordat of Worms. The church vs state conflict truly carried on throughout the Middle Ages and even through to the modern era.

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