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# Overvaluing the Stigma: An Example of Self-Stigmatization in the Jesus Movement (Q 14:26–27; 17:33)

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*Carlos J. Gil Arbiol*

Abstract

This article tries to show the usefulness of social-scientific models for interpreting biblical texts. The Sociology of Knowledge can help Historical Criticism build a framework in which to locate the data recovered by textual, formal, literary, and narrative criticism. Thus, merging both sciences, social and exegetical, we can get a better knowledge of the beginnings of Christianity. A model called “self-stigmatization” is described to illustrate how a charismatic leader unmasks social interests, legitimizes, and establishes a new social structure by taking on negative values or behaviors and converting them into positive ones. This model can be observed in the three sayings contained in Q 14:26–27; 17:33 about “rejecting family,” “carrying the cross,” and “turning life upside down.”

**I**t is my aim in this article to present an example of self-stigmatization in the movement begun by Jesus, taking as my base three sayings gathered in the Q document. I have divided the article into three parts and a conclusion:

Introduction of the self-stigmatization model.

Brief historical account of the sayings.

Explanation of this process in light of the self-stigmatization model (socio-scientific criticism).

## The Self-stigmatization Model

According to the sociology of deviation, self-stigmatization is the process through which a charismatic individual sets out to assume a social stigma and re-evaluate it positively in order to build an alternative to that situation (Lipp 1977, 1985; Katz 1972). Basically, this process embraces three stages. First, the charismatic individual has to unmask the strategies involved in motivating the stigmatization of certain social sectors. Second, he must legitimize an alternative to that situation, either through wise maxims, explicit theories, or the appropriate use of language (calling everything by its name); here the delicate aim is to allow the stigmatized individual to accept for himself an alternative which still does not exist. And third, the charismatic individual must create a plausible structure, which will allow the deviate to turn around the dominant meanings, so that what was stigmatizing before can be changed into something desirable, stimulating and thought-provoking. So, the stigmatized individual comes to be self-stigmatized.

This process tends to be repeated when there are several

stigmatized individuals who have followed this path. In the absence of the charismatic leader, the group will carry out his functions and try to unmask, legitimize and create the structure through which the alternative can be assumed by other social sectors. This group works as a “social laboratory,” which generates new frameworks of reference and alternative guidelines for action, thanks to its “reflective nature” and “ability to dramatize” (Goffmann: 42–46; Gusfield: 109–13). In this way, when the alternative is introduced to third parties, it can be made totally objective and can become independent of its creators; on the other hand, it brings about more ways to defend itself from society, which will try to neutralize and annihilate the threat of this alternative. If the main part of society is successful with this strategy, the self-stigmatized group will find itself integrated within the social order. If, however, the controlling mechanisms do not manage to block their plan, the charismatic group will have succeeded in turning their alternative into reality. At this point a multi-faceted process will be set in motion; on the one hand, the original charisma will have to be used to defend the new reality, and adaptation to everyday life will occur; but,

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on the other hand, this same defense mechanism may legitimize the alternative for the group members with even greater intensity.

### **Historical Account of Q 14:26–27; 17:33**

We find here three sayings of Jesus gathered in the Q document. As my analysis has shown (Gil Arbiol: 196), the original version in this document could be as follows:

He who does not hate (his) father or mother cannot be my disciple; he who does not hate (his) son or daughter cannot be my disciple.

He who does not carry his cross and follow me cannot be my disciple.

He who keeps his life will lose it; and he who loses his life will keep it.

The traditional evolution of these sayings is complex and reveals a common origin with various developments that have given rise to different versions. The first of the criteria common to all three is that of multiple attestation. The three sayings are testified to by the Q document and the Gospel according to Mark. The first and second sayings are also testified to by the Gospel according to Thomas; the second and third, also by the Gospel according to John. We have also seen in all three a Semitic background, as well as a lack of similarity with the context, nevertheless having clear roots in the same (Boring: 12–24; Evans: 127–46). In addition to this, all three fulfil the criterion of “difficulty”; they are sayings, especially the first two (hate and the cross), which are very difficult to justify if they are not historical (Bultmann: 161; Davies & Allison: 223). Consequently, I assume that the first and second are probably historical.

Various elements indicate that the third is the assimilation on the part of the first followers of Jesus of a common maxim, which immediately became part of the collection of sayings of Jesus which they transmitted: it is included in a current of thought of an “alternative” kind without distinctive indications of exclusive originality, such as the first two have. This would explain the added “for my cause,” which “Christianizes” it and makes it exclusive.

The three logia already appear grouped together in Document Q, to which Luke and Matthew had access; the second and third have been kept together in Mark 8:34–35, and in John 12:24–26, while the first and second are kept together in GTh 55, 101. In all three logia, the oldest account of their traditional evolution is that of Q.

However, these logia have certain characteristics which make them independent one from another, with the result that

they seem to have been put together only coincidentally (Bultmann: 29; 82–83; 143; Marshall: 666; Boismard: 231; Gnllka: 393; Bovon: 465–67). Proof of this is the fact that they have been put in different groupings throughout their history, apart from the different connecting elements with which they have been joined, different according to the case in question. Thus, many conjunctions are combined as the narrators see fit in order to relate them to each other. In regard to content, they also have an evident independence; they can be put into a discourse at any moment with a minimum of narrative adjustment; they are general, universal themes, which can be applied to many situations and can have an enormous variety of meanings; this is one of the characteristics of the *mashal*, or biblical proverb (Von Rad: 50).

Therefore, the groupings we maintain are secondary situations with respect to a prime moment: the transmission of these logia one by one. The combination of the second with the third shows how the cross was assimilated to losing one’s life (“martyrdom”), while the joining of the first with the second shows how the cross was understood as rejection of the family (Schulz: 431; Laufen: 312–13; Kloppenborg: 232; Luz: 142–144). His second saying is the one that serves as a hinge in every case; it is a very versatile logion. We can see this in Clement of Rome, who equates the bearing of the cross to the bearing of virginity (DE VIRGINITATE, 1.5.4.1–2), and the same occurs in GTh 55, 101. There is also another example: Artemidorus, ONIROCR., II, 56. Of the two associations, the second seems to be more direct (cross–loss of life) than the first (abandonment of the family–cross), given that it implies a more figurative sense of the cross, less direct and literal than the other.

This historical account could be traced as follows. To begin with, the first two had an independent life. Second, they were put together when they were transmitted orally, so that they reached Q in that form, and third, Q harmonized them formally and included the third logion in the same collection because of its similarity in theme (Kloppenborg: 232). Lastly, this material received a different kind of treatment in subsequent accounts in Q and, later, in the Synoptic Gospels. In Q, they formed a wise discourse which was placed at the end of the instruction comprising the formative stratum of Q; later, other material of a controversial nature was added. For their part, both the source of Mark (Mark 10:29–30; 8:34–35) and GTh 55, 101 grouped these sayings—originally independent—together. Mark, Matthew, and Luke adapted this tradition to the creation of their respective Gospels, and included it in a wider editorial project.

### **Social-scientific Criticism (Q 14:26–27; 17:33)**

Accepting this historical account as trustworthy, let us try

to read it in the light of the self-stigmatization model. To do this, we will use the model as a transparency, in such a way that it will allow us to identify that process in the framework of the model. We are going to look at this process in three stages: the charismatic leader, the followers, and the communities.

*Jesus the Charismatic Figure (First Stage)*

Q 14:26: "He who does not hate [his] father or mother cannot be my disciple; he who does not hate [his] son or daughter cannot be my disciple."

Jesus broke with his family for the sake of the rootless style of life he carried out, and forged a new one in keeping with his own canons (Mark 3:35); this caused confrontations between him and his family (Mark 3:21, 31–34). In fact, it is very difficult to know from one single saying what produces what: whether the break from the family led Jesus to an uprooted way of life or whether this way of life caused him to break with the family. However, as we can see in the saying in which Jesus identifies himself as a "homeless person" (Q 9:58), there are plenty of situations that lead to a way of life that is rootless in both a social and cultural sense, and this leads of necessity to radical breaking-away actions such as we have here.

In the saying we find in Q 14:26 Jesus asks his followers to "hate" their own families, presumably when those families are opposed to seeing one of their members going off to live like Jesus. The determining factor in this break from the family ("hating") is that in that very moment a way of life begins, defined precisely by separation from the basic institution, from the "sacred canopy" (Berger 1990) that gives shelter to every individual within society. This is a disruption of the symbolic universe, of everything in a framework of values, principles, presuppositions, judgments, etc., that make up the framework of good sense legitimizing a way of life. This split requires a new legitimization, some knowledge made socially objective that serves to explain and justify the new situation. As P. Berger (1981: 52) says:

By legitimization, we understand some knowledge made socially objective that serves to explain and justify the social order; here we have the answers to any question about the *raison d'être* of social agreements. . . . This indicates that they have a degree of objectivity very different from mere human conjecture about the reasons and causes behind social happenings. The legitimizations can be of a cognitive or normative nature. They not only tell the people what they should be; sometimes they simply say what they are.

Thus, the follower who fulfils this requirement set by Jesus will have to solve two problems. First, he must reject his present identity—namely, move away from both the group to which he belongs and his own personal history. Breaking from his own

family in this way means a violation in his own life-experience. Thus the follower of Jesus leaves behind the background that enabled him to understand himself, and he can then reconvert his identity, a task that would be impossible if he had not broken with the past (Berger & Luckmann: 201). A. Kirk, following on from V. Turner and L. G. Perdue, introduces a three-step itinerary (separation, liminality, reincorporation) to express the transforming power of wisdom and sapient literature. In this regard, the separation from the original context is fundamental for the transformation to succeed; this is the main function of Q 14:26.

Secondly, he must identify himself as "anti-family," which is equivalent to "deviate," "anti-social person," in a society that gives so much importance to this institution (Hanson & Oakman: 20-22); and from then on, this label will go with him forever. This negative tag, which the follower assumes when he joins the group, is, in terms of the sociology of knowledge, the first step in the process of legitimization, consisting in the "name change" (Berger & Luckmann: 120–21; Berger 1981: 54; Holmberg: 171) and it is therefore the first element in his new identity, based henceforth on stigmatizing elements. This change of name, of both the subject and the other basic realities, is reflected in the Gospels, for instance, in the changing of Peter's name (Mark 3:16 & //; John 1:42).

These two fundamental steps (the denial of his past identity and "normal" state, on the one hand, and the adoption of the label of "deviate," on the other), undoubtedly constitute what we have described as self-stigmatization. As far as we know, neither Jesus nor the daring disciple—man or woman—who went along with this saying had previously deserved to be called "deviate."

Some scholars have a different opinion about the origins of the followers of Jesus. M. N. Ebertz, for example, says (264):

The recruitment base of the circle of followers of Jesus was made up of individuals whose collective experience of being outsiders as Galilean Jews tied in with the isolation of their own life situation. It is probable that some of the disciples of Jesus whom we know only by name came from the world of small autonomous farm-workers who still survived to some extent, but who found themselves threatened with economic isolation—in other words, with the loss of social class. . . . On the other hand, the first disciples called by Jesus—those we have talked about already—found themselves outsiders in a cultural and religious sense, including even those from the shores of Galilee, the "bilingual Greek-Palestinians." In regard to these, and the other fishermen, "likewise considered to be people outside the law"—especially in the case of the tax-collector belonging to the circle of Jesus' disciples—we may suspect that they experienced a deep feeling of incoherence in their situation in life.

We must, however, keep in mind the fact that the category

of “deviation”—and even that of “the condition of outsider”—arises when the central group decides that such behavior cannot be allowed, but not when they consider it within the realm of the acceptable. For being poor, or being a fisherman, or having economic problems and seeking the collapse of the system, one is not a “deviate” or “stigmatized.” The point of view of the greater part of society is not the same as that at the center of society; when we consider the times in which Jesus’ disciples lived, we find nothing to suggest that the majority were, originally, stigmatized for being deviates, even if some of them were.

In fact, the followers had willingly chosen a “style” of life that set them apart from others; they had held up a label saying: “Here is a dangerous social rebel,” because the mere existence of an alternative reality within the heart of the same society meant a threat for the vision of that society held until that time. Thus, the negative label was going to produce the very effects it was aiming at: it would place the wearer outside the established limits.

The agents of such a rule go right back to a whole cultural tradition which, more and more, defined respect and honor for one’s progenitors, and the obligation of caring for one’s own children, as a basic value, even considering it proper to the Jewish identity (cf. Sir 3:1–16; 7:27–28; 30:1–13). This is so much the case that the sudden break from the family signalled the end of those times. Jeremiah presents the break from one’s own family in terms that are just as hard as those used by Jesus (Jer 12:6; 13:14; cf. Mic 7:6).

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### The disciple takes on a new name that identifies him as a member of Jesus’ group: he stigmatizes himself.

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In this context, the twofold purpose of the saying of Jesus is, first, to annul society’s control over the members of Jesus’ group and to get free from the ties used by the system to maintain its control. And, second, the aim is to generate a workable structure which could give the members of the group a new social reality. Consequently, we must understand the disdain and hate not as hate directed at the parents and sons themselves, but as disdain for the power that they may exert as “arms” of a social system which “makes use of” them. And we must also understand that Jesus was not criticizing the entire social system, but the forces of control that it exerted over its members, making any changes impossible and impeding the establishment of their goal: the kingdom of God.

The strategy of this logion, therefore, aimed to produce an effective self-stigmatization. That is, a “normal” member of society was asked to renounce that state, thus lowering himself in the social scale formed and legitimized by the reigning sym-

bolic universe and the forces used to control that society. In that way he became one of the group of outsiders created by that society: those who, like Jesus, chose to renounce their families in a shocking way in order to be free of their bonds.

Q 14:27: “He who does not carry his cross and follow me cannot be my disciple.”

This saying is directed at those who already suffered a kind of social stigma similar to that meant by the “cross” in that context: the worst label to express disgrace, humiliation or exclusion. Therefore, it is, in principle, a saying meant, not for those individuals accepted in society according to its basic values, but for those “stigmatized individuals” who were in fact already excluded and already bore the most deeply-woven negative attributes—which were, in a way, irreversible (like the cross, which was equivalent to death). Venturing to suggest some typology which would fit in with this very intense stigma of the cross, we could draw a parallel with lepers, or those suffering some dreadful physical abnormality, or beggars beyond help, slaves, convicts, prisoners condemned to death, etc.

Jesus asked these individuals to “bear” this cross, to make it “theirs” and to “follow him”—or, in other words, to adopt the strategy of consistent self-stigmatization through which the individual identifies himself with the negative attributes of the label and accepts it as his/her own identity. So, intensifying that which at first sight appears undesirable, the disciple takes on the new name which identifies him as a member of Jesus’ group: he stigmatizes himself.

Through this saying, Jesus wanted to bring about a rethinking in regard to the meaning of social symbols, using one of the most intense for his purposes. In that way he managed to defy society, taking the position of those at the top of the social scale, those who assign these meanings, and giving this symbol a meaning different from that which it had encompassed before. This challenge was all the more forceful because it came from the outer margins of society, from Jesus, who was an outsider (and perhaps conscious of being so). Thus, as a result of this choice of such a negative label as an identifying “badge,” the power that society had exerted over him until then was wiped out. Consequently, Jesus took on social functions which really belonged to the controlling powers, in spite of being on the outer fringes of society. These controlling powers then found themselves stripped of their authority, and Jesus’ followers acquired an unusual freedom with respect to others in the elaboration of their own alternative.

When the new candidate, on joining the group, becomes aware of this strategy, he discovers the path to free himself from the negative domination of society, and this gives him a new life.

#### *The First Post-paschal Followers (Second Stage)*

The first followers of Jesus take these sayings and endow

them with an authority that comes from their charismatic leader: Jesus. These are maxims rescued from oblivion by these followers because they needed to legitimize the situation they were in: they had suffered a process of alternation which had to continue, a process whereby the individual's subjective conscience has adopted an alternative to his symbolic universe (Berger 1976: 8–47). In other words, we might say that they had voluntarily set themselves apart (rejecting the family), or they had adopted existing stigmas in a positive way (bearing the cross); the fact is that they needed to legitimize their status to themselves and to others. So, both sayings of Jesus came to identify those who had followed Jesus at the beginning.

Those who now wished to be part of the group had to reject their families and take on the negative signs (the negative labels) that this entailed, and that turned out to be a threat of annihilation. These sayings were the central points of “initiation rites” before the newcomers could join the group of followers, and through them they would break their ties with the past and assume the social stigmas that defined the group and the individual who belonged to it. In this way they constituted an alternative path.

Throughout their oral transmission, the different groupings of the sayings in this tradition demonstrate the varying interpretations and their applications in those times. For example, in the Q version these two sayings were put together with a third (Q 17:33: “He who keeps his life will lose it; and he who loses his life will keep it”) so that this version expresses the symbolic inversion effectively carried out by those who transmitted these sayings of Jesus. This shows that they were made fully conscious of the stigma they bore, they raised it to an objective and public plane, they separated it from any possible negative evaluation and interpreted it the other way around, giving the listeners an impression of ambiguity which made a social re-interpretation possible.

Mark 8:34–35 and 10:29–30 and John 12:24–26, to cite another example, show us how this tradition was applied to the condition of martyr, when the group of followers were suffering the attempts on the part of the controlling social forces to annihilate them; in these situations they respond by taking on the stigmas for which they are persecuted, and the cross acquires a real significance.

#### *The First Communities (Third Stage)*

The later versions of this tradition of sayings reveal different kinds of communities. On the one hand, the Q document is witness to a “community” that creates a “set of rules” for the managing of its own life; here, the purpose of the tradition we are studying was to show “the narrow path” (Q 13:24) that constituted the followers’ way of life, in which the most outstanding and important characteristic was symbolic inversion. The “set of rules” was to become an explicit theory aiming to

legitimize the whole institutional sector. The functions had been diversified, and the transmitting group became a group of specialists in theory who would build up a body of knowledge to legitimize the group. In time, the group would diversify even more, defining itself more clearly in relation to the social context around it, which was a constant threat for the newly created social order. Therefore, the Q tradition was broadened by a new stratum in which a series of controversial traditions including the last judgment were put together. The centre of attention was gradually moving towards daily life, and the group had to defend itself even more strongly from those outside it.

On the other hand, with varying shades of meaning, the accounts of the Synoptic Gospels signify a kind of re-initiation and re-activation of self-stigmatization, although on levels that were more theoretical than practical: their aim was to begin again the process that was showing signs of “becoming routine,” gathering the sayings of Jesus safeguarded within this tradition in order to apply them to their situation. In this way it was possible to unleash a process similar to that which Jesus would set in motion, creating multi-faceted phenomena, in which a certain “establishment of routine,” and assimilation of the central positions in society, went alongside the resurgence of self-stigmatizing processes in search of a return to the original intuitions.

#### **Conclusion**

I have tried to show the usefulness of social-scientific models for interpreting biblical texts. I have presented a model called “self-stigmatization,” which explains the stages through which, first, a charismatic leader unmasks social interests, legitimates and establishes a “new” social structure by taking on negative values or behaviors, overturning them into positive ones. Second, this model describes how the followers of the charismatic leader develop the process, by choosing new negative values or behaviors and overturning them into positive ones as identity signs. Third, the process comes into institutionalization because of the necessary defense against the “old” social structure.

This model can be observed in the three sayings contained in Q 14:26–27; 17:33 about rejecting family, carrying the cross, and turning life upside down. The developing of this cluster of sayings gives some clues to detect items of the self-stigmatization process. First, we can see in Q 14:26 how Jesus wanted to call attention to the control function of the family over the individuals and why it is necessary to break this tie to establish an alternative. Second, we can see in Q 14:27 how Jesus invites us to overvalue a stigma so as to counteract the control of the society through the negative labeling. Third, in Q 17:33 we can contemplate a general saying, added to the Jesus tradition by his followers, that expresses their success in overvaluing the stigma. At the end, secondary additions and editorial features of redactors show the necessity of defense against society.

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