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https://biblicalstudies.org.uk/articles_grace-theological-journal.php

THE "POOR" IN THE BEATITUDES OF MATTHEW AND LUKE

GARY T. MEADORS

The identification of the poor in Luke 6:20 has been disputed. Some have seen them as the economically impoverished. However, it must be noted that Jesus was specifically addressing his disciples when he uttered the beatitude of the poor. Furthermore, Luke 6:20-26 stands in the literary tradition of an eschatological reversal motif found in Psalm 37, Isaiah 61, and in certain Qumran materials. A comparison of Luke 6:20-26 with these materials indicates a connection between πτωχοὶ in Luke 6:20 and the Hebrew term עניים, which had become metaphorical for the pious. This connection is supported by the fact that Matthew records the same logion of Jesus as πτωχοὶ ἐν πνεύματι (5:3). Thus, the term "poor" in Luke 6:20 is used in reference to the pious.

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INTRODUCTION

Do the "poor" in Luke's account of the beatitudes refer to the economically impoverished whereas the "poor in spirit" in Matthew's account refer to the pious? It has become quite common to answer such a question in the affirmative and thus to see a dichotomy between the two accounts. Indeed, redactional studies have correctly observed that Luke's gospel contains more unique material concerning the poor and oppressed than the other gospels. However, the reason for this has been much debated. This study argues that the "poor" in both accounts of the beatitudes refer primarily to the pious. (This is not to deny, however, that they may also have been economically oppressed.) Thus, in the beatitudes Jesus sought the spiritual reversal of life situations.

THE BEATITUDES IN LUKE

NT scholarship today generally recognizes that underlying the Matthean Sermon on the Mount (Matthew 5-7)¹ and the Lukan

¹Cf. the helpful survey by Warren S. Kissinger, *The Sermon on the Mount: A History of Interpretation and Bibliography* (Metuchen, NJ: Scarecrow, 1975).

Sermon on the Plain (Luke 6:20–49; cf. 6:17–19) is “one basic piece of tradition.”² However, the two recountings of this tradition are not identical. Nevertheless, I believe that Matthew and Luke are faithful to the *ipsissima vox* of Jesus (i.e., ‘the same voice’, meaning that the essential meaning is maintained although the very words may not be). Although the gospel writers may have altered the words of an individual logion or discourse of Jesus to emphasize a particular aspect, they retain the essential meaning. For example, the beatitude of the poor (Matt 5:3; Luke 6:20) is generally considered to have its source in the same logion of Jesus. Its meaning, therefore, in both Matthew and Luke should correspond although its use in context may reveal individual emphases.

A Word About Audience Analysis in Context

It is essential in determining the teaching intent of a passage to ascertain to whom it was addressed. Matthew and Luke both indicate that the primary recipients of the sermon are the disciples, including more than just the twelve (Matt 5:1–2; Luke 6:20a). It is interesting, however, that while Matthew’s statement is clear, Luke’s is strikingly specific. Luke pictures Jesus’ delivery of the beatitudes as an eye to eye encounter with his disciples and uses the second person rather than the third person throughout his beatitude pericope. The statement in Luke 6:20b concerning their present possession of the kingdom further supports the assertion that Jesus was addressing a restricted audience although the curious multitudes were surely present (6:19) and were privileged to eavesdrop and to consider what import Jesus’ teaching might have for themselves.

To understand Jesus’ teaching intent, two additional factors are important within the general and immediate context. The resentment and deepening rejection of Jesus by the religious leaders are quite clear in Luke’s context (6:1–11). The conflict would result in harassment and eventually murder (6:11). Immediately after revealing the vicious intent of the religious leaders, Luke records the beatitude pericope which centers upon the theme of conflict, rejection and persecution. This conflict and persecution theme is stated in terms of poor and rich within an eschatological reversal motif.

In light of these initial observations of the general and immediate context, it may well be that poor and rich primarily serve a literary function and that “the expressions rich and poor function within the

²I. Howard Marshall, *The Gospel of Luke: A Commentary on the Greek Text* (NIGTC; Grand Rapids: Eerdmans, 1978) 243; cf. Raymond Brown, “The Beatitudes According to Luke,” in *New Testament Essays* (Garden City: Doubleday, 1968) 265–66; and Joseph A. Fitzmyer, *The Gospel According to Luke (I–IX)* (AB; Garden City: Doubleday, 1981) 627.

story as metaphorical expressions for those rejected and accepted because of their response to the prophet."³ The poor are those who follow Jesus as do the disciples and the rich are the religious leaders who oppress those who are followers of God. Jesus' teaching is not in response to economic conditions but is a result of the deep felt rejection of his teaching and claims. Actual poverty which might exist is merely the attendant circumstance of those who follow Jesus.

Audience analysis leads to at least one initial conclusion which must be remembered in the following analysis. The interpreter cannot go beyond the intended audience in the identification of the poor in Luke 6:20. The poor cannot be the unbelieving hungry of the Third World. Such assertions border on universalism in light of Luke 6:20b.⁴ As I. Howard Marshall has observed,

the description of them as being persecuted for the sake of the Son of Man shows that the thought is not simply of those who are literally poor and needy, nor of all such poor people, but of those who are disciples of Jesus and hence occupy a pitiable position in the eyes of the world. Their present need will be met by God's provision in the future. The effect of the beatitudes is thus both to comfort men who suffer for being disciples and to invite men to become disciples and find that their needs are met by God.⁵

The Presence of Isaiah 61 in Luke 6:20

In his study of Matt 5:3-5, David Flusser asserts that "the first three beatitudes as a whole depend on Isa. lxi, 1-2."⁶ The Lukan pericope also evidences the influence of Isaiah 61. Linguistically, the presence of *πτωχοί* (Luke 6:20b; cf. Isa 61:1a), hunger (Luke 6:21a; cf. Isa 61:5, 6), and mournfulness as implied in weeping (Luke 6:21b; cf. Isa 61:1b, "brokenhearted"; 61:2b; 61:3; 61:7) reflect Isaiah.⁷ Theologically, the motifs of eschatological release (Jubilee) and reversal are dominant in both Isaiah and Luke.⁸

³Luke T. Johnson, *The Literary Function of Possessions in Luke-Acts* (Missoula: Scholars, 1977) 140.

⁴Cf. Ron Sider, "An Evangelical Theology of Liberation," in *Perspectives on Evangelical Theology*, eds. Kenneth S. Kantzer and S. N. Gundry (Grand Rapids: Baker, 1979) 130-32.

⁵Marshall, *The Gospel of Luke*, 246.

⁶David Flusser, "Blessed Are the Poor in Spirit," *IEJ* 10 (1960) 9; cf. Ernest Best, "Matthew v. 3," *NTS* 7 (1961) 255-58.

⁷Asher Finkel, "Jesus' Sermon at Nazareth (Luk. 4, 16-30)," in *Abraham Unser Vater: Juden und Christen in Gespräch über die Bibel*. Festschrift für Otto Michel (Leiden: Brill, 1963) 113; and Asher Finkel, *The Pharisees and the Teacher of Nazareth* (Leiden: Brill, 1964) 156-58.

⁸Robert B. Sloan, *The Favorable Year of the Lord: A Study of Jubiliary Theology in the Gospel of Luke* (Austin: Schola, 1977) 123-27.

What would be the significance of the influence of Isaiah 61 on the Lukan beatitude? Assuming Jesus' audience was familiar with Isaiah 61 and its promises, the catchwords, such as עניים or πτωχοί, and the eschatological themes "would have been recognized as having more than economic significance."⁹ My earlier study on the vocabulary of the poor in the OT, Qumran, and the first century pointed out that the poor motif had historically taken on religious nuances particularly as evidenced in Isaiah and the Psalms.¹⁰ Jesus' audience was Jewish, not the twentieth century Western world. The significance of his teaching must be reconstructed in terms of his first century audience. F. C. Grant's analysis of the mentality of the first century pious Jew in light of the Magnificat and the beatitudes makes the following observation:

If we may judge from the first two chapters of the Gospel of St. Luke, assuming that we have here, at the very least, an authentic example of first-century Jewish piety and a suggestion of the atmosphere of our Lord's boyhood, it would seem probable that those among whom He grew to manhood were not political enthusiasts, but pious, humble devotees of the ancestral religion. The Messianic hope, as they cherished it, was conceived in its more transcendent and less political form: pacific, priestly, traditional, and non-militaristic. . . . [The Magnificat] was the hope of 'the poor in the land', for whom their poverty had come to have a religious value since they hoped for salvation through none save God. It was a confidence nourished by the Psalms, (as in Psalm xxxvii), 'the poor' and 'the humble' (*aniim* and *anawim*) become almost interchangeable terms.¹¹

The question of economic status is not the issue in Isaiah nor in Luke. The emphasis is upon following God and for the faithful Israelite and for the disciples of Jesus in the present era it will often result in being oppressed.

A TEXTUAL COMPARISON OF MATTHEW 5:3 AND LUKE 6:20

The Matthean and Lukan Sermons are quite divergent in form and some general comparative observations would be helpful before considering the beatitude concerning the poor. Matthew's version (chaps. 5-7; 109 verses) is over three times longer than Luke's account (6:20-49; 30 verses). However, sayings recorded as part of the Sermon

⁹Thomas Hoyt, *The Poor in Luke-Acts* (Ann Arbor: University Microfilms, 1975) 115.

¹⁰Gary T. Meadors, "The Poor in Luke's Gospel" (unpublished Th.D. dissertation; Winona Lake, IN: Grace Theological Seminary, 1983); cf. Raymond Brown, *The Birth of the Messiah* (Garden City: Doubleday, 1977) 350-51.

¹¹F. C. Grant, *The Economic Background of the Gospels* (New York: Russell & Russell, reprint 1973) 119-20.

on the Mount in Matthew are found elsewhere in Luke (cf., e.g., Matt 5:13 with Luke 14:34-35; Matt 5:14-16 with Luke 8:16 and 11:33; and Matt 5:17-20 with Luke 16:16-17).¹²

There are also many similarities between Matthew and Luke. The sermons are both addressed to Jesus' disciples in proximity to a mountain. They both begin with a beatitude pericope and end with an exhortation to receive God's truth as communicated by the words of Christ. The same sequence is followed by both even though Luke omits much material. Many other similarities and dissimilarities have been delineated in the literature on the sermons but it is not necessary to repeat them in the present discussion.¹³

The beatitude of the poor is recorded by Matthew and Luke as follows:

Matt 5:3
Μακάριοι οἱ πτωχοὶ τῷ πνεύματι,
ὅτι αὐτῶν ἐστὶν ἡ βασιλεία τῶν
οὐρανῶν.

Luke 6:20b
Μακάριοι οἱ πτωχοί,
ὅτι ὑμετέρα ἐστὶν ἡ βασιλεία
τοῦ θεοῦ.

Line two in each is equivalent in word order but with some rather interesting differences. Matthew uses the third personal pronoun αὐτῶν while Luke uses the second person possessive pronoun ὑμετέρα. Luke's use of the second person gives his beatitude a more personal flavor.¹⁴ Matthew's use of οὐρανῶν rather than θεοῦ with βασιλεία is probably a metonymy since heaven is the place of God's abode.

The most discussed aspect of the beatitude of the poor, however, has to do with the dative of relation τῷ πνεύματι/'spirit' in line one. Unless Jesus gave the same basic logion in the two different forms, then either one or the other is more original. Jeremias has suggested that the brevity of Luke's Sermon indicates that it represents the earlier form.¹⁵ Flusser, however, asserts that Matthew has faithfully preserved the original logion and Luke abbreviated it without altering its meaning.¹⁶ F. C. Grant long ago suggested a mediating position. He wrote, "it is probably that the Lukan version is more accurate, verbally; but it must be understood in a more Matthaean spirit. 'Poor,'

¹²See Kurt Aland, *Synopsis Quattuor Evangeliorum* (revised ed.; Stuttgart: Württembergische Bibelanstalt, 1967) in. loc.

¹³Cf. Hoyt, *The Poor in Luke-Acts*, 99-102; Fitzmyer, *Luke (1-IX)*, 627-29; and C. H. Dodd, "The Beatitudes: A Form-Critical Study," in *More New Testament Studies* (Manchester: Manchester University, 1968) 1-10.

¹⁴Robert Gundry, *Matthew: A Commentary on His Literary and Theological Art* (Grand Rapids: Eerdmans, 1982) 68. Gundry asserts that in the OT beatitudes the 3rd person is used more than the 2nd.

¹⁵Joachim Jeremias, *The Sermon on the Mount* (London: Athlone, 1961) 17.

¹⁶Flusser, "Blessed are the Poor in Spirit," 11.

e.g., meant more than economically dependent; the word had a religious connotation, which Matthew's elucidation, 'poor in spirit', more accurately represents."¹⁷

Flusser's assertion is based primarily on the conflation of Isa 61:1 and 66:2 in the Dead Sea Scrolls (1QM xiv. 7). The result of his comparisons render רוח עניי וכאי רוח, עניים and עניים as interchangeable and synonymous expressions. Consequently, πτωχός and πτωχός τῷ πνεύματι would be the interchangeable Greek equivalents.¹⁸ W. D. Davies makes a similar observation on the basis of Qumran:

The Lucan 'poor' need not be regarded as necessarily more primitive than the Matthaean 'poor in spirit'. But it is still more likely that Matthew made the term 'the poor' more precise by the addition of 'in spirit' than that Luke deleted the latter, although, as we indicated in the text, 'the poor' and 'the poor in spirit' have the same connotation.¹⁹

The conclusion to the whole matter, if one is faithful to the religious *sitz im leben* of pietistic Judaism, is that regardless of the *ipsissima verba* (the actual words) of Jesus, the *ipsissima vox* is the same. The πτωχοί are the Anawim.²⁰ In the case of the Sermon the πτωχοί are the disciples as a class of followers. In Luke 6:20 it designates a group; it does not describe a social state of being. A social state of being may be attendant (cf. Luke 6:21–22), but it is not the focus of the term πτωχοί. If it were merely a social state of being, then all of those who are in such a state would 'own' the kingdom (6:20c). This would be soteriological universalism. Guthrie rightly cautions on this point, "since possession of the kingdom of God is the consequence of this 'poverty', it seems to suggest a spiritual element, for the 'kingdom' cannot be understood in any other way."²¹

THE ESCHATOLOGICAL REVERSAL MOTIF IN LUKE 6:20–26

The unique theme which is present in Luke's but not in Matthew's beatitude pericope is the theme of reversal. This theme is present elsewhere in Luke in the Magnificat (1:46–56), the parable of Lazarus and Dives (16:19–31), and in the 'first shall be last' logion (13:30; cf. 9:48; 14:11; 18:14). This theme of reversal of conditions may

¹⁷Grant, *Economic Background*, 118, n. 1.

¹⁸Flusser, "Blessed are the Poor in Spirit," 1–13; cf. E. Bammel, "πτωχός," *TDNT* 6 (1968) 896–92. W. F. Albright and C. S. Mann, *Matthew* (AB; New York: Doubleday, 1971) 46.

¹⁹W. D. Davies, *The Setting of the Sermon on the Mount* (Cambridge: Cambridge University, 1964) 251, n. 2.

²⁰Anawim is a transliteration of the Hebrew term for poor. It has become a term to refer to the class of pious Jews.

²¹Donald Guthrie, *New Testament Theology: A Thematic Study* (Downers Grove: InterVarsity, 1981) 900.

be observed in the OT in Psalm 37 and Isaiah 61. The reversal is often stated in an antithetic formulation, such as rich/poor or wicked/righteous.

A similar reversal was known in the Classical Greek world as a *περιπέτεια*.²² The reversal of human fortune was a dominant motif in Attic drama and was discussed as a reversal of roles in philosophic literature.²³ The *περιπέτεια* motif in Scripture has a particularly moral overtone. It is also a divine reversal which is apocalyptic in nature. The reversal comes by the action of God not the revolutionary efforts of the proletariat. C. H. Dodd clearly describes the ethical nature of the Lukan *περιπέτεια*:

On the face of it, the Lukan *pericope* might appear to contemplate a catastrophic revolution in which the proletariat achieves a signal success at the expense of the privileged class. As such, it would fit into a contemporary pattern of thought in the Hellenistic world. But it is clear that it is a sublimated or 'etherialized' kind of *περιπέτεια* that is here in view: the reward is *ἐν οὐρανῷ*, and that clause conditions all the rest. If the parable of Dives and Lazarus is allowed as an illustration, the 'etherialized' character of the reversal of conditions is emphasized.²⁴

The structure of Luke 6:20-26 is best seen by comparing the four 'couplets'.²⁵ The antithetical parallelism is not formal²⁶ but it is conceptually present. Reveral motifs are by nature dichotomous.

- | | |
|--|---|
| 20. Blessed are ye poor: for yours is the kingdom of God. | 24. But woe unto you that are rich! for ye have received your consolation. |
| 21. Blessed are ye that hunger now: for ye shall be filled. | 25. Woe unto you, ye that are full now! for ye shall hunger. |
| Blessed are ye that weep now: for ye shall laugh. | Woe unto you, ye that laugh now! for ye shall mourn and weep. |
| 22. Blessed are ye, when men shall hate you, and when they shall separate you from their company, and reproach you, and cast out your name as evil, for the Son of man's sake. | 26. Woe unto you, when all men shall speak well of you. for in the same manner did their fathers to the false prophets. |

²²Cf. Arnold J. Toynbee, *A Study of History* (London: Oxford University, 1939) 4. 245-61.

²³Ibid., 246.

²⁴Dodd, "The Beatitudes," 5-6.

²⁵The following translation is from the American Standard Version (1901).

²⁶Fitzmyer, *Luke (I-IX)*, 636.

The first question in determining significance is to ascertain to whom the blessings and woes are spoken. Luke 6:20a clearly presents the primary audience as a group of disciples within eye contact of Jesus. The blessings are appropriate for this group, but the woes are incompatible for them except as a warning not to neglect their commitment (Heb 2:1-4). Therefore, who is the "you" in the woe section? They must be the perimeter crowd of privileged eavesdroppers. Who in that crowd would fit the description given? The key lies at the front door in Luke 6:1-10.²⁷ Jesus had just completed several Sabbath controversies with the Pharisees and Scribes. This confrontation ended in a deepening rift between Jesus and the contemporary leaders of Judaism (Luke 6:11). This division will broaden as Luke's story progresses (cf. Luke 8; 11:14-13:9). The language of the woe section applies well to this group. Luke 6:26 is especially applicable as will be observed below.

A second area which confronts the reader in Luke 6:20-26 involves the nature of the language used in the pericope. The temporal implications are indicated by the contrasting use of *vōv* and the future tense in 6:20-21; 24-25. The future aspect is further indicated by "that day" and "in heaven" in 6:23. The language of the pericope gives no hope for reversal in the present age. At this point it is obviously not a call to revolution but to hopeful resignation. It is divine realism for the present and divine optimism for the future.

The language is also contrastive. It utilizes poetic extremes: hunger and full, weep and laugh, hate and admire, and poor and rich. It is thoroughly semitic. Psalm 37 is an OT example (cf. Isa 61:1-3 also) of the reversal of the poor and rich under the rubric of wicked/evil and righteous. The language in reversal genre is categorically symbolic. Poor and rich in Luke 6 are first of all categorical. The social situation behind the language is real but not foundational. The close of the sermon in Luke 6:46-49 illustrates this principle well from a different perspective. The houses and their fate are symbolic of one's response to truth.

The symbolism of certain aspects of the language in 6:20-26 is well illustrated by the expressions "hunger," "mourn," and "weep" in 6:25. In the eschatological reversal, in what sense will the presently satisfied group experience lack? Will they be huddled off into a corner without provisions? No. Rather the reversal initiates their existence in hell in the eternal state. They are illustrated by Dives in Luke 16, another Lukan reversal passage. Since we may safely assume that

²⁷Cf. the implication in the closing of the Sermon in 6:46-49 to the fate of the religious status quo.

mealtimes do not exist in the eternal state, the language is symbolic of a real experience.²⁸

The conclusions to the blessings (6:22, 23) and woes (6:26) sections provide crucial information concerning the intended significance of this pericope. The theme which permeates these concluding verses and consequently the whole unit may be summarized by the word "identification." The devout followers are clearly identified with their Lord as the ἔνεκα phrase indicates, being better translated "because of the Son of Man" (*NIV*). It is because of their identification with Christ that they suffer in the present age. If ὄνομα refers to the name which signifies them as followers, whatever that name of identification may be (cf. James 2:7; 1 Pet 4:14), rather than signifying their personal reputation, the point of identification is strengthened.²⁹

But with whom are those of 6:26 to be identified? The key lies with the phrase of πατέρες αὐτῶν. This phrase is doubly emphatic. It is attributive and it is placed at the end of each section. One wonders if Jesus' eyes did not glance away and gaze at the religious leaders for a moment. The πατέρες theme recurs in Luke 11:47-48, where Jesus reveals the deeds of the Pharisees' forefathers. Luke 11 falls within a lengthy polemic between Jesus and the religious leaders (11:14-13:9) and contains six woes upon the Pharisees.

Not only is οἱ πατέρες αὐτῶν emphatic, it is also unique to Luke's structure (cf. Matt 5:12),³⁰ thus emphasizing further the crucial point of identification within the Lukan context. Furthermore, Luke 6:26 uniquely emphasizes the "false prophets" in contradistinction to Matthew, who only refers to the godly prophets. The contrasting symbolism of identification, therefore, may be that "just as the persecuted disciples are the representatives of the true Prophets, so the wealthy hierarchy whom all men flatter are the representatives of the false (Jer v. 31; Comp. xxiii. 17; Isa xxx. 10; Mic. ii. 11)."³¹ This hierarchy within the context of Luke's gospel is constituted by the Pharisees and their crowd.

CONCLUSION

The teaching intent of Luke 6:20-26 centers in the theme of identification with God's messenger and program. Such identification

²⁸This language may be reminiscent of the future banquet as seen in Luke 14:12-24.

²⁹Marshall, *The Gospel of Luke*, 253.

³⁰Fitzmyer, *Luke (I-IX)*, 635.

³¹Alfred Plummer, *A Critical and Exegetical Commentary on the Gospel According to St. Luke* (ICC; Edinburgh: Clark, 1896) 183.

will entail persecution, including physical, mental, and social ramifications. But the transitory nature of life and its problems are not to be compared to the eschatological hope (6:23). Conversely, to refuse to identify with God's program and pursue worldly ambition has disastrous consequences. These consequences are intensified when they relate to oppressing God's people and program. The religious leadership of Judaism, whether ancient or contemporary, was perennially guilty of not recognizing and following God's true prophets. This confrontation in the earthly ministry of Jesus led to a fiery polemic in Luke's gospel between Jesus and the religious leaders, a polemic which plagued the apostles after Jesus was gone as the book of Acts so clearly portrays. The greater context of Luke 6 seems to imply that the unique structure of Luke's beatitude pericope may well be an early expression of this polemic via the acceptance and rejection motif.

The signification of *πτωχοί* in Luke 6:20 is similar to that of a developing usage of עניים in the Psalms, Isaiah, and Qumran. It symbolically relates to religious attitude. Matthew makes this quite clear by the emphasis on ἐν πνεύματι, and the sense of Luke's simple *πτωχοί* was the same in the ears of his auditors. On the other hand, social and economic oppression are attendant to a faith commitment. Jesus wanted his followers to know that they were getting into a situation of oppression for the duration of their earthly sojourn; he was not instructing them on how to get out of oppression. The only way out is up (cf. ἐν οὐρανῷ in Luke 6:23).³² To assert that Luke's pericope is merely "an essay on social concern"³³ is to miss the point.

³²This solution is the essence of the reversal motif throughout its usage. Cf. Bammel, "πτωχός," 6. 893, 895, 898, 906, 910.

³³Grant Osborne, "Luke: Theologian of Social Concern," *TJ* 7 (1978) 136.