COVERT RESEARCH IN POLITICALLY HOSTILE DIGITAL ENVIRONMENTS[1]

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***Resumo**: A pesquisa encoberta é uma abordagem metodológica que não requer consentimento informado dos sujeitos. Nas humanidades, ela normalmente assume a forma de observação participante, onde os sujeitos não sabem que estão sendo observados ou assumem que o observador é um participante comum em vez de um pesquisador. Essa abordagem tem sido considerada eticamente controversa há muito tempo, em grande parte devido a debates herdados da ética biomédica. No entanto, nos últimos anos, a pesquisa encoberta tem atravessado um período de renascença, impulsionada pela ascensão dos métodos digitais e pela crescente proeminência de públicos politicamente hostis. Este artigo examina como esse interesse renovado na pesquisa encoberta introduz um novo conjunto de desafios éticos e metodológicos, particularmente em relação aos debates em andamento sobre uma agenda defensiva para a democracia digital.*

***Palavras-Chave:** Pesquisa encoberta. Ética na pesquisa. Públicos politicamente hostis.*

***Abstract**: Covert research is a methodological approach that does not require subjects' informed consent. In the humanities, it typically takes the form of participant observation, where subjects are either unaware they are being observed or assume the observer is an ordinary participant rather than a researcher. This approach has long been considered ethically controversial, largely due to debates inherited from biomedical ethics. However, in recent years, covert research has undergone a renaissance, driven by the rise of digital methods and the growing prominence of politically hostile publics. This article examines how this renewed interest in covert research introduces a new set of ethical and methodological challenges, particularly related to ongoing debates over a defensive agenda for digital democracy.*

***Keywords:** Covert research. Research ethics. Politically hostile publics.*

1. Introduction

The use of covert or disguised research methods raises ethical controversies in multiple directions. However, in recent years, it has become the cornerstone of a diverse and rigorous set of social inquiries focusing on disputes over a defensive agenda for digital democracy. It is a kind of renaissance for covert research methods, which seek to address issues related to (1) the fundamental role of the researcher—whether to prioritize the alleged well-being of the

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research subject or the advancement of scientific knowledge and, particularly in this case, the consolidation of democracy; (2) the substantial differences between in-person research and research mediated by digital platforms and devices, which often pose insurmountable obstacles to obtaining informed consent; and (3) the renewed interest from scholars, alongside the large-scale emergence of publics that are increasingly hostile to academic research and democracy itself.

Broadly speaking, a covert research method does not require the explicit consent of research subjects. In the humanities, it usually takes the form of participant observation, where subjects are either unaware that they are being observed or assume that the observer is an ordinary participant rather than a researcher. While there are other forms of covert research, including in disciplines outside the humanities, this particular approach remains one of the most established within this debate. It is, therefore, diametrically opposed to one of the most extensively discussed ethical and moral imperatives in academic research: free and informed consent. Free and informed consent, or simply informed consent, has become not only a foundational criterion for Institutional Review Board (IRB) evaluations but also, in Erikson's words (Erikson, 1967), a marker of what is considered legitimate scientific inquiry. It implies that observed subjects must enjoy freedom and autonomy in deciding whether they want to be part of a study, granting explicit authorization based on a clear understanding of the research's purpose and potential consequences. Covert research, on the other hand, bypasses this procedure entirely, which is why it remains highly controversial, particularly among humanities scholars. Despite this, it has gained increasing traction over the last decade, spurred by a reassessment of its costs and benefits in specific contexts.

One of the key driving factors behind this resurgence—though not the only one—is the emergence of politically hostile publics: those who reject academic research as biased, compromised by mainstream institutions or industry, or simply as irrelevant and unwelcome. Some also oppose the recognition of political pluralism, adopting a strongly antagonistic stance toward perceived adversaries. Hostile publics can be classified in several ways, but practical examples include (1) those openly hostile to science itself, such as anti-vaccine movements, flat-earthers, and conspiracy theorists; (2) those hostile to structured academic knowledge, who rely exclusively on native epistemologies and perceive research as intrusive—such as certain identitarian groups, esoteric communities, subversive movements, or criminal organizations; and (3) those hostile to human rights and democracy, including

groups that reject social diversity, actively work toward exclusion, and in some cases, resort to aggression or violence, such as fascist, extremist, supremacist, nativist, anti-feminist, or anti-LGBTQIAPN+ groups.

With the rise of these attitudes, social research—particularly in fields concerned with opinion formation and public sphere dynamics—has encountered increasing resistance, limiting not only researchers' access but, more importantly, society's access to data on these groups. As a result, covert research has become a more usual strategy, even among scholars committed to ethical research. Consequently, a new set of ethical debates needs to emerge around the legitimacy of studying politically hostile groups through covert means—both as an antidote to growing social opacity and as a necessary tool for research committed to democratic values.

To better understand the implications, constraints, and ethical dilemmas associated with covert methods—rather than simply advocating for their advantages—this article aims to review key arguments from both advocates and critics of their use. Furthermore, to support the claim that covert research is experiencing a renaissance, it is essential to examine the profound transformations that the social research landscape, particularly in political communication, has undergone in recent years.

One notable development in this regard is the increasing institutionalization of research ethics committees and the standardization of review protocols for studies involving human subjects. This framework originates from ethical and moral concerns raised by controversial research practices, some of which date back to the atrocities of the Holocaust. However, the incorporation of covert methods into contemporary social inquiry introduces a distinct set of challenges and ethical reflections.

Another significant shift relates to the intersection of covert methods with digital methods (Sou, 2021; Rogers, 2013). This convergence introduces an entirely new methodological apparatus that requires critical engagement. While certain principles from traditional covert research can be adapted to digital environments, others necessitate a reconsideration of assumed risks, potential harms, and the evolving negotiation of informed consent. Furthermore, the distinction between public and private spheres in digital spaces complicates the ethical landscape, suggesting that covert research in analogic contexts differs substantially from its digital counterparts.

Finally, as previously argued, the proliferation of politically hostile publics—especially, though not exclusively, within digital platforms—has intensified these challenges. The growing reluctance of these groups to accept external observation exacerbates societal polarization and obstructs knowledge production about movements that resist political pluralism and democratic values. Covert research has historically been a key strategy for investigating such environments, but in recent years, its significance has evolved. Not only have these groups become increasingly organized, often transnationally, but they have also begun shaping broader ideological narratives, influencing individuals who may have previously engaged only peripherally with their agendas. Additionally, critical scholarship on these groups is now, in many ways, deeply intertwined with the broader defense of democracy as a research imperative.

These three key issues are discussed in detail below.

2. Dawn and dusk of covert research

The scientific community's concerns regarding covert research largely stem from ethical dilemmas inherited from biomedical experiments conducted by Nazi doctors and scientists during the rise of the Hitler regime in Germany. The brutal experiments performed in concentration camps shocked public opinion and became a central focus of the trials held by the Military Tribunal in Nuremberg after World War II. These proceedings led to the conviction of numerous regime officials in the case known as United States v. Karl Brandt et al. and culminated in the drafting of a seminal document establishing ethical principles for scientific experimentation involving human subjects.

The Nuremberg Code ([1947]1996) gained prominence within the international scientific community due to its ten statements, the first and most detailed of which defines the necessity of voluntary consent as "absolutely essential." It holds that:

> This means that the person involved should have legal capacity to give consent; should be situated as to be able to exercise free power of choice, without the intervention of any element of force, fraud, deceit, duress, over-reaching, or other ulterior form of constraint or coercion, and should have sufficient knowledge and comprehension of the elements of the subject matter involved as to enable him to make an understanding and enlightened decision.

The notion of voluntary consent— later described as informed consent—became the foundation for the Declaration of Helsinki, developed by the World Medical Association ([1964]2024). This declaration represents a milestone in research ethics, particularly in its reinforcement of respect for individual autonomy and the right to self-determination when enrolling in a study, as well as several principles in doctor-patient relationship codes. It asserts that "[w]hile the primary purpose of medical research is to generate new knowledge, this goal can never take precedence over the rights and interests of individual research subjects," thus, ethical considerations are positioned as paramount, even superseding local or global laws and regulations when necessary. Since its initial version, the WMA document has undergone multiple revisions, incorporating new precepts. One of the most significant amendments occurred in 1975 when the declaration introduced the concept of an "independent committee"—a precursor to the Institutional Review Boards (IRBs) that now oversee research ethics in the United States and numerous other countries.

Originally conceived within the biomedical sciences, informed consent evolved into a widely adopted ethical standard, extending to other disciplines, including the humanities. Spicker (2011) argues that informed consent has become a presumption of research legitimacy, even though critics view its formalistic application as an instance of "empty ethics" (Corrigan, 2003). Nevertheless, the rapid adoption of this principle beyond its medical origins prompted extensive reflection, particularly within the humanities.

Indeed, much of the foundational work in the humanities and social sciences relies on covert research (Roulet et al., 2017). Studies such as those of sociologist William Foote Whyte ([1943]1993), who laid the groundwork for urban anthropology and pioneered grounded research, would have been impossible without some level of concealment. Foote Whyte initially presented his research objectives transparently to his informants but, given their reaction, gradually adopted a more disguised approach—interacting as an ordinary participant or simply stating that he was writing a book about Cornerville.

Another widely cited case is that of Erving Goffman (1961), who conducted research in a psychiatric hospital while presenting himself as a psychiatric assistant. Leon Festinger's (Festinger, Riecken and Schachter, [1965]2008) study of an apocalyptic cult provides an even more extreme example: he and his team infiltrated the group to observe meetings and interview participants. His findings contributed to the development of cognitive dissonance theory, which posits that individuals experience psychological discomfort when confronted

with inconsistencies in their beliefs and behaviors, prompting them to adjust their attitudes accordingly. Such insights would have been unattainable without the researcher's covert engagement as an insider.

Another highly controversial case is Laud Humphrey's (1970) research on anonymous same-sex encounters in public restrooms, in which he assumed the role of a "watchqueen"—an authorized voyeur—to gain access to his subjects. Likewise, Stanley Milgram's (1963) famous obedience experiments involved an element of deception, and remain some of the most ethically controversial experimental studies to this day: recruited participants were led to believe they were acting as research assistants, unaware that the supposed victim of the malevolent experiment was indeed an actor.

These examples illustrate that covert research often involves varying degrees of concealment and deception, resulting in experiments in which the subjects do not fully control the purposes and consequences of their own participation in the research. While there is no unanimous consensus in the literature, scholars such as Bulmer (1982b) argue that covert methods exist along a nuanced spectrum rather than a simple binary distinction between overt and covert approaches. Spicker (2011, p. 119) draws a crucial distinction between covert research and outright deception, emphasizing that: "researchers who engage in deception mainly say they are doing one thing when they are actually doing another (as in Milgram's famous experiments)." On the other hand, covert research is characterized essentially by a limited disclosure of the research action.

The difference between covertness and deception is not supported by Punch (1986) or by Roulet et al. (2017). However, as Spicker (2011) argues, covert research does not necessarily involve fraud or deceit. He contends that it can occur when the researchers simply stand and observe; when they participate in a public event, such as a soccer match or political demonstration; or when they gather information of any kind without the subjects' knowledge or authorization. Thus, while covert methods are often associated with participant observation, they also extend to in-depth interviews, discourse analysis, and unauthorized biographical research. Even structured methodologies, such as surveys, may incorporate elements of disguise—e.g., through the use of proxy indicators to gauge respondents' opinions (Lugosi, 2006).

And although investigative journalism, particularly gonzo journalism, often celebrates cases where journalists assume false identities—such as Gloria Steinem (1963), who

infiltrated Playboy Clubs disguised as a bunny to expose workplace harassment—this type of deception is typically met with far greater ethical scrutiny in scholarly research. Yet, as Castañeda and Smith (2023) observe, formal consent does not necessarily guarantee ethical integrity and therefore cannot be considered the ultimate ethical and respectful solution for social inquiry. For example, research subjects in precarious conditions, such as individuals experiencing homelessness or mental illness, may be pressured into participation through implicit coercion (e.g., access to social benefits being contingent upon study enrollment).

Despite these complexities, informed consent remains widely upheld in the scientific community, sometimes in an overly rigid or naive manner—assumed to inherently safeguard research subjects' autonomy and well-being. Debates about covert research in the social sciences have persisted since the 1950s (Coser, 1959; Shils, [1959]1982) and gained traction through the Erikson vs. Denzin (Erikson, 1967; Denzin and Erikson, [1968]1982) debate, with scholars both advocating for greater flexibility (Homan, 1991; Holdaway, 1982) and opposing covert methods as ethically untenable (Shils, 1982; Bulmer, 1982a; Bulmer, 1982b). However, many ethics manuals or essays—such as those by Piper and Simons (2011) or Padilha et al. (2005)—continue to promote consent primarily for institutional compliance (Roulet et al., 2017) rather than as a substantive ethical safeguard, and do not bother to find a common definition to both the disputed notions of consent and risk (Hibbin, Samuel and Derrick, 2018).

Advocates of overt methods emphasize that social scientists bear multiple ethical responsibilities—to their subjects, to their peers, and the broader legitimacy of the field. Erikson (1967) argues that informed consent is indispensable, while Punch (1986) condemns researcher concealment, warning that it may erode trust in academic research, since the scholar could come to be seen as a wolf in sheep's clothing.

Conversely, more radical perspectives, such as Douglas' (1976), highlight that deception is pervasive in everyday life—individuals routinely manipulate information to serve their interests—suggesting that covert research merely reflects social practices. Denzin counters Erikson's concerns, arguing that overt disclosure can create discomfort and hinder authentic participation (Denzin and Erikson, 1982). Punch (1986) once more asserts that researchers should avoid framing their role as conflict mediators between scientific inquiry and participant welfare, instead focusing on context-specific ethical reasoning.

Among proponents of covert research, three dominant justifications are the most widespread ones (Roulet et al., 2017). The first is the Machiavellian or consequentialist approach, in which research outcomes justify deception if the knowledge gained outweighs individual concerns. According to this argument, a proportional ratio should be applied to evaluate opportunities and threats, and science precedes individual interest, something that, in the view of some critics, should be avoided (Padilha et al., 2005).

A second common justification is the so-called Kantian approach, which holds that ethical decisions should be guided by universally acceptable principles (Roulet et al., 2017). Then, while individuals have their right to autonomy and self-determination if the outcomes of the experiment prove to be unanimously fair, there is nothing wrong with them.

Lastly, there is a third argument called the situated ethics approach, which emphasizes ongoing reflexivity throughout the research process, requiring the ethical integrity of the research to be continually justified, at the beginning of the work, during the investigation, and when leaving the field (Roulet et al., 2017). Although it is a more pragmatic perspective, when it comes to the IRBs procedures, it tends to be adopted only by more experienced researchers, able to go beyond the merely formalistic level of ethical evaluation of projects, according to Hibbin, Samuel and Derrick (2018).

Bumler (1982b) refers to an interpretive framework according to which one can identify at least two dimensions of covert observation: role-playing and role pretence, since the researcher's role not only varies between covert and overt but also between insider and outsider. Thus, four variations are possible: the overt insider, who assumes a role in the social organization studied and is simultaneously recognized as a researcher; the overt outsider, who is perceived as a foreign observer; and their opposites—the covert insider, who typically involves some level of deception; and the covert outsider, who may simply be an anonymous observer. Ultimately, as he notes, covert research exists along a continuum of disclosure, between secrecy and openness, which challenges rigid biomedical-derived ethical models that persistently marginalize covert studies as categorically illegitimate.

3. Digital and covert methods in orbit collision

While there has been a longstanding tradition around covert research spanning several decades, since the model was transposed from the biomedical sciences to the human and

social sciences, the changes resulting from digital methods continue to be a largely neglected topic. In the digital environment, as Calvey (2017) points out, lurking has always been an accepted strategy and rarely scrutinized. This is because, as in the example of Goffman, who had to disguise himself to infiltrate mental institutions, covert research in in-person fieldwork is routinely associated with some degree of deception. However, in the digital environment, the researcher is subsumed within a mass of other users and platform affordances, resulting in nothing more than a presumed audience for one's computer-mediated actions. The feeling of spectrality and the narcissistic and individualized experience are so strong that, although inadvertent encounters may occur as a result of context collapse (Marwick and boyd, 2011), most of the time, there is a trend for researchers to normalize the idea that, if a piece of information or a profile is available on digital platforms, it is not necessary to seek consent for its use in academic research. On the other hand, the situation seems to be reversed when it comes to the unauthorized recording of online events. In these cases, the limited number of participants makes the exclusivity of the activity evident and demands accountability, something that was rarely considered in face-to-face fieldwork, as attested by Punch (1986) and Powdermaker ([1939]1993).

This ambiguity has become increasingly prevalent as the relationship between public and private—already difficult and complex in covert research as a whole—has become even more intricate due to the inherent characteristics of the digital medium. Spicker (2011), for example, invites us to reflect on the nature of the public sphere in academic research. He argues that public actions are governed by distinct forms of ethical normativity and that they should be publicly observable. Therefore, there would be nothing unusual about a researcher attending a trial or bringing attention to matters of public interest (Ribeiro, 2009). Spicker (2011) also points out that there is a growing consensus that domestic violence should be treated as an issue of public interest and, therefore, would fall within this type of methodological procedure. Furthermore, what distinguishes a public environment from a private one is not—and should not be—the setting in which actions take place since private matters can be addressed in public arenas, and public matters in private arenas (Spicker, 2011).

The problem is precisely that this distinction becomes blurred and complex when applied to digital platforms. As Chadwick (2013) points out, platforms are hybrid spaces, functioning as private services of public interest, where public and private figures coexist,

private opinions are expressed alongside public discourses and public communication, and privacy is often deliberately exposed. This phenomenon aligns with what Barnes (2006) characterizes as a "privacy paradox"—a situation that Hibbin, Samuel, and Derrick (2018) describe as a self-professed desire for greater privacy that contradicts behavioral patterns of increased personal disclosure.

Platforms themselves constitute an environment of heightened opacity (Chagas and Da-Costa, 2023) and pervasive surveillance (Zuboff, 2019). Users often lack clear access to the kinds of information being monitored, while scholars frequently find barriers to accessing data of public interest due to commercial constraints. As a result, participant observation emerges as a valuable method for understanding platform dynamics and tracking the circulation of information and opinions. Furthermore, in the context of academic research involving user groups and online communities, negotiating or securing informed consent can be particularly difficult due to the unstable and ephemeral nature of digital identities (Hine, 2001). The overarching conclusion, as Calvey (2017, p. 204) aptly describes, is that the digital environment constitutes a "covert playground" or an "ethical labyrinth."

Authors such as Hibbin, Samuel and Derrick (2018) emphasize that obtaining consent in the digital sphere can be impractical or even unfeasible, given the fluidity of identities and the absence of a tangible and delimited field. Reid (1996) recounts a personal episode from her research on MUDs, where she grappled with the issue of informed consent while studying player behavior. She ultimately concluded that the only stable authority to whom she was accountable was the group of channel administrators. She then sought their permission, leaving it up to them to decide whether and how to inform other participants. Punch (1986) further argues that even in analogic settings, requesting consent may be inappropriate, as it interrupts the activity being held and can lead to the adoption of performative social masks, which distort authentic interactions.

Furthermore, as highlighted by the Association of Internet Researchers (AoIR) Ethics Guidelines, one of the few professional codes specifically dedicated to ethical considerations in digital research, managing informed consent is "manifestly impractical in the case of Big Data projects, resulting in a serious ethical dilemma" (Franzke, 2020, p. 10). The AoIR Ethics Guidelines are certainly not the only framework addressing covert research. Various professional associations and public research bodies maintain their ethical codes—some more permissive (such as the American Psychological Association, the American Sociological

Association, and the Australian National Health and Medical Research Council) and others less so (such as the American Academy of Management, the British Sociological Association, and the Brazilian National Health Council) regarding the disclosure of studies and the waiver of informed consent (Roulet et al., 2017; Spicker, 2011; Padilha et al., 2005). However, there are very few initiatives explicitly discussing the transposition of these ethical dilemmas to research in digital environments.

As an illustration of these drastic changes, Calvey (2017) asserts that little or no harm is caused to subjects observed in the context of digital covert research, due to the distance, remoteness, and absence of intrusion, which, in a way, aligns with the principle of non-interference. However, even when referring to face-to-face fieldwork, advocates of covert methods challenge the presumed assumption that not revealing the identity of the researcher necessarily harms the subjects. In this regard, Roulet et al. (2017) argue that the criticism is paradoxical, since there are situations where such public disclosure is sufficient to provoke abrupt changes in behavior, and concealment, on the other hand, would not expose participants to any risk. Lugosi (2006) acknowledges that it is more challenging to find evidence of stress among participants in covert experiments, and that methodologists often presume that subjects would feel offended. In one way or another, the digital environment introduces both new and existing dilemmas, as well as some procedural changes.

In his personal notes, Goffman remarked that he had to memorize all the observations made in situ during his study because he could not take notes at the time (Roulet et al., 2017). In the digital environment, such a situation would simply not arise, because fieldwork is often mediated by a screen, which provides the researcher with multitasking capabilities and enables them to record events as they observe them without significant difficulties. Moreover, time compression is another very distinct factor, since covert observation can occur in an environment of asynchronous interaction. This profoundly alters the way some covert research is conducted, as the data are simply accumulated and can be analyzed both synchronously and retrospectively, with proportions preserved. This is somewhat reminiscent of Bruno Bettelheim's (1943) famous and autobiographical covert research in a concentration camp, in which he recorded his observations for months and only later analyzed his notes through the lens of a psychologist.

In short, digital media has reignited interest in covert research. And while much of this research has been conducted without sufficient ethical consideration, there is undoubtedly a

set of concerns highlighted by key scholars in the field that reinforce the need to establish new paradigms for reassessing informed consent as a landmark of ethical research.

4. Hostile secretive publics and covert studies awaken

Studies on politically hostile publics have been revamped in recent years, due to the complex relationship these publics have developed with digital media and the attention they have attracted when they emerged into the public scene with great force after socially traumatic events such as the COVID-19 pandemic, the electoral victories of several far-right governments around the world, and the mass political demonstrations of the past decade and a half. Prior to this, politically hostile publics were studied only marginally or from a strictly historical perspective. Since then, research on conspiracy groups (Rabo, 2020), far-right groups (Chagas, 2022), and those who propagate hate speech or threaten democratic institutions (Cesarino, 2022) has grown substantially.

Despite this, there has been little real progress in the ethical and methodological discussion surrounding these approaches. Knüpfer, Jackson, and Kreiss (2024) argue that Political Communication Research is unprepared for the study of the far-right. They contend that there is essentially a root problem in recognizing that the conceptual frameworks of the field presuppose adherence to the norms and practices of liberal democracy, while, in reality, these publics are self-reflective and radically challenge this status, positioning themselves as outsiders and questioning the fundamental principles of democratic life. They also highlight the fact that a large number of scholars prefer to adopt neutral or broad labels, such as "alternative," "populist," or "counterpublic," hesitating to seriously address the democratic threat posed by such actors.

While the authors' diagnosis is accurate, their reflection does not go beyond calling on researchers to take a position from a theoretical perspective. Methodologically, however, it is still common to encounter resistance to abandoning ethical paradigms of research inherited from other fields and eras. For instance, when commenting on the drastic shift in research on conspiracy groups, which has revived the use of participant observation methods, Rabo (2020) offers a series of recommendations to researchers, such as suspending disbelief while refraining from going native, but does not address the issue of covert methods. Thiem (2020), when discussing the fact that, for a long time, only journalists and non-academics were

concerned with understanding the phenomenon of conspiracy groups, strongly criticizes the absence of informed consent in several of the investigations produced.

Much of the debate surrounding covert studies is permeated by a strong concern about the interference of the researcher, not only on private individuals in isolation but also on the group as a whole, particularly when it comes to vulnerable groups. Spicker (2011, p. 91) asserts that critics view covert methods as a "process that is intrinsically biased against people who are disadvantaged," and while this may be true, he argues that disclosure can create more risks and that privacy can serve to deflect greater scrutiny of abusive behavior in the domestic sphere. He then urges researchers studying topics such as violence, drug trafficking, or sexual abuse to consider the rights of victims, not just the perpetrators'.

The issue of privacy is one of the most frequently cited arguments against the covert approach. For many authors, academic research must involve a commitment to the confidentiality of subjects (Padilha et al., 2005; Piper and Simons, 2011), and any intrusion of this kind would violate this contract. However, covert research does not actually invade privacy; it merely illuminates behaviors confined to the private sphere, and when conducted ethically, it maintains the confidentiality of subjects.

Additionally, as discussed in the previous section, there is a tendency to assume that harm and offenses are perpetrated by covert research, emphasizing the greater participation of subjects in the research, as informants, and with their consent (Lugosi, 2006; Herrera, 1999). However, when dealing with a politically hostile public, this argument may not be as feasible.

According to Roulet et al. (2017), studies on deviant behaviors and secret organizations often constitute socially relevant topics, justifying the withdrawal of consent as one of their essential prerogatives. Some professional ethical codes hold that covert research is a valid and ethical methodological approach under two specific circumstances: when the field poses a risk to the continuity of the research or when the subjects being researched, or the actions that take place in the field, suggest that disclosure represents a risk to the safety of these subjects or the researchers themselves (Brazilian National Health Council, 2016).

In contrast, Roulet et al. (2017) identify three important advantages of conducting covert studies: they provide access to information from secret organizations, collect data unbiased by informed consent, and gather "pure" data as if experienced first-hand. The use of concealment and lurking is often referred to as strategies to address "cyber hate," according to Calvey (2017). However, this argument also faces resistance from proponents of overt

methods. Ribeiro (2009) asserts that sensitive research on drugs, among other examples, has been conducted with informed consent.

In fact, with the resurgence of the far-right in several parts of the world, many researchers have focused on these actors, and some initiatives study these groups with their consent. Rocha (2021) reports that at the beginning of her research, she encountered several dilemmas and feared her investigation would be interrupted when she sought permission to conduct documentary research in the archives of an ultraconservative think tank. However, to her surprise, she was granted permission. Other examples, such as Cesarino (2022) and Chagas (2022), among others, have developed their reflections based on a model that is at least partially covert.

Some recommendations for researchers, especially in the digital environment, suggest avoiding fake profiles or deceptive research (Franzke, 2020), while others generally advocate for debriefing (American Psychological Association, [2003]2017), although this type of strategy is more effective in controlled or laboratory experiments (Roulet et al., 2017). There are also various patterns of covert research in digital fieldwork, ranging from researchers who simply lurk to those who actively participate in or moderate online forums and groups, or even hire trained research assistants to access them. Punch's (1986) inquiry into the differences in the rights of public and private figures is also relevant in the digital environment. Furthermore, an essential discussion that also pertains to research with politically hostile groups on digital platforms is how to withdraw from fieldwork, gradually reducing participation (Bulmer, 1982b).

Hostility towards research and democracy, in general, provides a significant justification for opting for covert research. Participant observation in online groups and communities associated with the far-right, terrorists, or conspiracy theorists, to name a few examples, is a high-risk activity for the researchers; thus, their identity must remain confidential. The unequal power dynamics in these situations protect the safety and privacy of the researcher, as it cannot be said that the observed subjects constitute a vulnerable group. This, of course, does not exempt the researcher from ensuring ethical and respectful treatment during fieldwork. However, it is essential to recognize that the potential for disclosure could pose an immediate risk to the continuity of the research, by triggering the researchers' banishment from the environments they are studying, as well as threats, extortion, or online lynching. Additionally, presenting oneself as a researcher in a transparent manner could lead

to discredit and delegitimization, as subjects often reject scientific knowledge and, under a perverse inverted logic, associate it with politically compromised entities.

There is a growing number of initiatives dedicated to supporting researchers who face harassment and intimidation campaigns, such as the Researcher Support Consortium (2024). These organizations acknowledge that researchers are often deterred from expressing their views on potentially contentious topics or voicing their concerns in politically hostile environments.

Bulmer (1982a) asserts that extremist groups often draw parallels between covert research and espionage, portraying researchers as generally untrustworthy individuals. Punch (1986), in ultimately opposing covert methods, argues that, in addition to potential reprisals related to the funders or publishers of the studies, researchers must always be aware of the dangers posed by hostile environments. With a final irony, he rejoices in not studying organizations like the Pentagon or the Ku Klux Klan, signaling that the more hostile the monitored groups, the greater the risks faced by the researcher—something, for him, that would simply not be worth it.

Politically hostile audiences should, therefore, spur a new wave of considerations regarding the validity of covert methods. However, what we have seen so far is that the debate has not evolved as it should within the humanities and social sciences.

Although covert methods have been established as a methodological approach in some of these studies, particularly those dealing with political discussion in private messaging services (Chagas, 2022; Chagas and Da-Costa, 2023; Herrada Hidalgo, Santos and Barbosa, 2024; Piaia et al., 2022; Scheren et al., 2024), little is discussed regarding how this approach could enhance political communication research or research in related fields. As a result, the discipline in particular and the humanities, in general, continue to lack a comprehensive ethical-methodological and epistemological debate that would allow them to lead social inquiry autonomously, independent of concepts inherited from biomedical ethics. In the broader context of the humanities, while the condemnation of this method is based on legitimate concerns about the rights of research subjects, it is often interpreted rigidly, neglecting other neighboring rights (Spicker, 2011).

Lugosi (2006) argues that "[e]xisting literature on covert investigation and methods provides an inadequate frame of reference for understanding covertness in fieldwork." The literature addressing this issue consistently points out that the concerns regarding the

inadequacy of the method are often exaggerated and that there is a continuum between consent and non-consent that defies a simplistic binary ethical assessment (Roulet et al., 2017). Furthermore, studies highlight a profound divergence in the understanding of consent, particularly among scholars on ethics committees, as consent in research on social media, for example, is often assumed to be tacit (Hibbin, Samuel, and Derrick, 2018). Finally, the rise of studies on politically hostile groups in recent years has highlighted the extent to which the field now demands a new approach from scholars. For this renaissance to take effect, however, it is crucial that researchers not only adopt this defensive stance on digital democracy, broadening studies and investigations on hostile environments to enhance societal knowledge of such groups and organizations, but also that a qualitative debate deepens the understanding of the limits, challenges, and opportunities of these methods—without resorting to a priori judgements, ex machina solutions borrowed from other fields, and always remaining grounded in situated ethics.

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