

ICMI Archiving Guidelines (Version March 2026)

1. ICMI Archive

The International Mathematical Union (IMU) maintains an archive of the activity and history of the IMU and its commissions and committees – including ICMI, the International Commission on Mathematical Instruction. The archived material is physically preserved at a facility established at the IMU Secretariat in Berlin and equipped to serve this purpose. Digital records (including the IMU and ICMI websites) are kept safely on a long-term storage system. All archived material is registered in an archive database to make it searchable and accessible, labeled according to its category of confidentiality.

The ICMI Archiving Guidelines and confidentiality classifications for materials are modelled on, and consistent with, the IMU Archiving Guidelines.

2. Aim of the ICMI Archive

Keep record of and reflect the activity and history of the International Commission on Mathematical Instruction (ICMI) in all its facets.

Keep record of all aspects of the International Congress on Mathematical Education (ICME).

Keep record of and reflect the activity and history of ICMI committees, namely:

- ICMI Executive Committee (EC)
- ICMI Awards Committees
- ICMI ad hoc committees.

The ICMI Archive serves mainly to support the work of the ICMI EC. The material is also available for historical research. Some documents however are subject to certain restrictions in accordance with section 5 of these guidelines.

3. Demand for archiving

The four-year term of office of each ICMI EC is the time-span unit applicable to archiving in the ICMI Archive.

There is the general responsibility to archive all documents/material created by the ICMI President and Secretary-General, as well as by ICMI administrative staff. Further, ICMI Awards Committee chairs have the obligation to provide certain material to the ICMI Archive. There is no requirement to archive material created by ICMI Affiliate Organizations.

Other material supplied to the ICMI Archive can also be preserved.

The ICMI Secretary-General and ICMI President inform the relevant colleagues/committee Chairs about their obligation to supply the ICMI Archive with material relating to their work (see 6).

4. Classification of archive material

The person/body delivering material to the ICMI Archive is required to assign one out of the three categories of ICMI's confidentiality classification to the material and to label it accordingly. Material delivered without labeling will be classified by the ICMI Secretary General. The ICMI EC is authorized to modify characteristics of the ICMI confidentiality classification. Likewise it is authorized to change the confidentiality category of material archived if deemed necessary (usually from a lower level of confidentiality to a higher level and only very exceptionally from a higher level to a lower level).

5. ICMI categories of confidentiality and access

ICMI category of confidentiality	A) General unclassified	B) ICMI internal use only	C) Confidential
Embargo time (years)	0	20	70
Public access	Immediately	20 years after the end of the four-year term during which the material was created.	70 years after the end of the four-year term during which the material was created.
Availability	The material is available to everybody. Copying permitted subject to copyright restrictions.	During embargo: The material is available to ICMI officers, ICMI EC, ICMI and IMU administrative staff. After embargo time: Category A) applies.	During embargo: The material is available to ICMI officers, ICMI EC, ICMI and IMU administrative staff, except for material of ICMI Awards Committees. Material relating to Awards Committees will be digitized where necessary by the IMU Archivist under the supervision of the IMU Secretary-General. After embargo time: Category A) applies, unless the material concerns living persons.
Exceptions		The ICMI EC may grant, upon request, access before the end of the embargo time for purposes of research in intellectual history or for reasons of law.	The ICMI EC may grant, upon request, access before the end of the embargo time for purposes of research in intellectual history or for reasons of law, except for material relating to ICMI Awards Committees.
Examples of material (List is not intended to be comprehensive; can be updated over time)	Printed matter such as books, journals, brochures, press releases. All contents of the ICMI website, including documents that can be downloaded from the website Artefacts of ICMI events	Minutes of meetings internal to ICMI (e.g., EC, CANP, AMOR Advisory Board, other ad hoc committees established by the EC) Correspondence (including emails) and discussion within the EC Agreements with persons and institutions	Correspondence and emails documenting the appointment of ICMI Awards Committee chairs and members. Correspondence and emails documenting the work of the ICMI Awards Committees. Final reports to the ICMI President from Chairs of ICMI Awards

	Printed or digitalized materials from past/completed ICMI projects Publications on the history of ICMI Interviews (only with the interviewee's consent)	(e.g., contracts with publishers) Documents related to bids for hosting ICME Financial items that are not, by statute, already publicly accessible	committees summarizing the deliberations of those committees. Non-official political or personal statements Oral history recordings (audio and video) and transcripts (the content of which is subject to embargo).
Remarks	Although there may be cases in which drafts are archived as well, typically only the final version of a document is archived to reflect the activity and history of ICMI. The person generating the document will make this decision. Any EC member can request that some additional documents be archived.		

Access to the material is provided upon request to the IMU Archivist.

6. Requirements and standards for the professional archiving of IMU material

ICMI officers, EC members, and Chairs of ICMI Awards committees are required to utilize the IT services provided by the IMU Secretariat, namely:

- Email accounts
- Mailing lists
- Webservers
- Cloud storage
- Blog servers
- Chat servers
- All other technical platforms provided by the IMU Secretariat

This is to ensure the capture of relevant data within the required technical specifications.

The user is responsible for the content and structure of materials created and processed via the above services, as well as for determining the applicable period of embargo. For unlimited accounts (e.g. icmi.president@mathunion.org), a final back-up will be carried out at the end of the relevant term for transfer to the ICMI Archive. All other accounts and access to services will be terminated three months after the end of the relevant term at the latest, with data and materials subsequently transferred to the ICMI Archive for storage.

Further materials – whether analogue or digital – can be transferred to the ICMI Archive on consultation with the IMU Archivist.

7. Final statement

The ICMI Archiving Guidelines may be amended by the ICMI EC when necessary.

Notes

1. The IMU Archive already includes ICMI materials. However, it would be beneficial for the ICMI EC to develop guidelines on what ICMI materials must be provided to the Archive and how materials should be classified in terms of level of confidentiality and access.
2. The ICMI Archive uses the same three categories of confidentiality and embargo times as the IMU Archive.
3. Example materials for each category of confidentiality in the ICMI Archive are broadly the same as in the IMU Archive. Selected examples are provided in the Table in section 5. Specific examples of material relevant to ICMI are provided in a separate Appendix to these guidelines. The material in the Appendix may be amended as the need arises.
4. Materials created by ICMI Affiliate Organizations are not required to be archived.
5. The IMU Archiving Guidelines refer to the IMU Archivist, who is an IMU employee responsible for archiving the materials of all IMU Commissions and Committees. The IMU Archivist is in regular contact with the IMU Archive Curator and the ICMI Archive Curator, both of whom are volunteers with honorary appointments.
6. Only the ICMI President, ICMI Secretary-General, and chairs of ICMI Awards Committees have ICMI email accounts. These are the only email accounts containing material that is transferred to the ICMI Archive.
7. In general, only the final versions of documents should be archived.
8. ICMI Awards committees' discussions and correspondence concerning candidates, nominees, nominators, and nomination documents: Nomination documents are emailed directly to the ICMI email address of the relevant Awards committee Chair and could be thus archived as email attachments.
9. Correspondence and emails documenting the appointment of ICMI Awards Committee chairs and members: The ICMI President makes these appointments in confidence, and the appointment letters must be archived (Category C). Only the names of the Chairs are made public at first. Committee member names are made public (in the ICMI Newsletter and posted on the ICMI website) only when their term of office ends.
10. Minutes of the ICMI General Assembly (GA): Minutes are currently provided on the ICMI website for only some GAs, and some of these minutes do not include information about the slate. **The IMU website provides full minutes for all IMU GAs, and it is desirable for ICMI do the same.** The GA minutes should include the slate, name of NC Chair and a list of nominations submitted (only the name of nominee, country, affiliation, name and country affiliation of nominator).

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Appendix: Classification of materials for the ICMI Archive

	A) General unclassified	B) ICMI internal use only	C) Confidential
Material			
Printed matter such as books, journals, brochures (includes: books published by CANPs; ICME Proceedings; ICMI Study Volumes)	X		
All contents of the ICMI website (includes: ICMI newsletters; static copies of past ICME websites; ICMI Study Discussion Documents, Study conference proceedings, and downloadable pdfs or open access versions of ICMI Study Volumes; minutes of ICMI General Assemblies – see below)	X		
Artefacts of ICMI events (e.g., ICME posters, badges, brochures)	X		
Printed or digitalized materials created by past or completed ICMI projects (e.g., Pipeline project)	X		
Publications on the history of ICMI (e.g., ICMI Centennial; other historical publications available on the ICMI website Online Archive)	X		
Minutes of meetings:			
ICMI EC meetings (including all attachments)		X	
ICMI General Assembly (including Nominating Committee slate and list of nominees)	X		
ICMI AMOR Advisory Board		X	
Other ad hoc committees and Boards established by the ICMI EC		X	
Correspondence (including emails) and discussions within the EC		X	
Agreements with persons and institutions:			
Contracts with publishers of ICMI Study Volumes and other ICMI publications		X	

ICME documents:			
ICME proceedings	X		
Bid document of successful and unsuccessful ICME bidding teams		X	
Agreement between ICMI and successful ICME bidding team		X	
IPC and LOC documents		X	
ICMI Study documents:			
Discussion Documents	X		
Study Conference proceedings	X		
Study Volumes	X		
Reviews and evaluations of ICMI Studies		X	
CANP documents			
CANP annual/quadrennial reports		X	
Reports/summaries of CANP workshops	X		
Evaluations of CANP		X	
Financial items not already publicly available (e.g., funding applications for conference support)		X	
ICMI Awards Committees:			
Correspondence and emails documenting appointment of ICMI Awards committee Chairs and members			X
Correspondence and emails documenting the work of ICMI Awards Committees			X
Final reports to the ICMI President from Chairs of ICMI Awards committees summarizing committee deliberations			X