

ANMD-MRS27-269 · Smart Campus Technologies

Library Digital Infrastructure

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

Library digital infrastructure modernises academic, public, school and special libraries by combining integrated library systems, digital repositories and RFID/self-service technology. This decision-grade study sizes the global market three ways — value, libraries served and collection size managed — across system type, capability and deployment model, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Beyond efficiency, library infrastructure enables measurable knowledge-access, digital-inclusion and preservation outcomes, while open access strengthens the equity and natural-capital story.

Mapped Sustainable Development Goals:

SDG 4 Quality Education	SDG 10 Reduced Inequalities	SDG 11 Sustainable Cities & Communities
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Measurable sustainability outcomes assessed:

- Knowledge-access and digital-inclusion gains
- Preservation and discoverability of collections
- Equity-of-access via open access and self-service
- Hardware e-waste, content-licensing equity and data-privacy as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	9 Report Parts	7 Regions Covered	40+ Country Markets
2025–32 Forecast Horizon	4 Forward Scenarios	25+ Companies Profiled	3 SDGs Mapped

MARKET OVERVIEW

From legacy ILS to cloud library-services — automated, discoverable, self-service knowledge hubs.

The library infrastructure market is moving from legacy ILS to cloud library-services platforms and digital repositories. Demand is driven by digital-collection growth meeting operational-efficiency pressure, supported by maturing LSP and open-access ecosystems across North America, Europe and Asia Pacific. The market is read three ways — value, libraries served and collection size managed — and forecast under four scenarios, each region reported separately.

- North America leads platform migration — the United States and Canada, on cloud-LSP adoption, digital repositories and discovery
- Europe is accelerating — the United Kingdom, Germany, Nordics and Netherlands, on open-access repositories and shared LSPs
- System type and capability segment the value — across ILS/LSP, digital-repository and RFID/self-service systems
- Digital access is the differentiator — discovery, repositories and self-service beyond physical shelves, increasingly cloud LSP subscriptions

REGIONAL OUTLOOK

Across seven reporting regions, the report separates early-commercialisation leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
North America	Migration leader	United States, Canada — cloud LSP, digital repositories, discovery
Europe	Accelerating	United Kingdom, Germany, Nordics, Netherlands — open access, shared LSPs, RFID self-service
Asia Pacific	Scale engine	China, Japan, India, Australia — large library networks, digitisation
Latin America	Emerging	Brazil, Mexico — library digitisation, access programmes
Africa	Frontier	South Africa, Kenya, Nigeria — digital-access expansion, low-cost systems
Middle East	Frontier	UAE, Saudi Arabia, Qatar — national-library investment, digital repositories

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> • Digital-collection & open-access growth • Operational-efficiency & staffing pressure • Cloud LSP & discovery-platform migration • RFID self-service & automation demand • Preservation, access & equity mandates 	<ul style="list-style-type: none"> • Budget constraints & procurement cycles • Migration complexity from legacy ILS • Content-licensing & e-resource cost inflation • Interoperability & metadata-standards gaps • Skills & change-management constraints

SEGMENTATION SNAPSHOT

By System Type	ILS / LSP · digital repository · RFID / self-service
By Capability	Cataloging & circulation · digital collections · self-service
By Component	Software / platform · hardware · content / services
By End User	Academic · public · school · special libraries
By Business Model	Licence · SaaS · data · managed service
By Deployment Scale	Single library · multi-branch · consortium / system

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part I — Report Foundation, Discovery and Strategic Intelligence

- › Chapter 1. Scope, Methodology and Report Architecture
- › Chapter 2. Industry Discovery Summary — Library Digital Infrastructure
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

Part III — Regional and Country Intelligence

- › Chapter 11. Global Regional Intelligence Framework
- › Chapter 12. North America Market Intelligence
- › Chapter 13. Europe Market Intelligence
- › Chapter 14. Asia Pacific Market Intelligence
- › Chapter 15. Latin America Market Intelligence
- › Chapter 16. Africa Market Intelligence
- › Chapter 17. Middle East Market Intelligence
- › Chapter 18. Rest of World Market Intelligence

Part IV — Technology, Innovation and Category-Specific Intelligence

- › Chapter 19. Technology Landscape and Architecture
- › Chapter 20. Emerging and Next-Generation Technology Intelligence
- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape

Part V — Company, Competition, Patent and Project Intelligence

- › Chapter 23. Competitive Landscape
- › Chapter 24. Company Profiles
- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
- › Chapter 26. Patent Landscape and Intellectual Property Intelligence
- › Chapter 27. Project, Deployment and Case-Study Intelligence

Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

- › Chapter 28. Sustainability Intelligence Suite
- › Chapter 29. ESG Intelligence and Double Materiality
- › Chapter 30. ESG and Sustainability Framework Alignment
- › Chapter 31. SDG Intelligence
- › Chapter 32. Carbon, Net-Zero and Climate-Mitigation Intelligence
- › Chapter 33. Water, Biodiversity and Natural-Capital Intelligence
- › Chapter 34. Circular Economy and Resource-Security Intelligence
- › Chapter 35. Social Impact, Human Capital and Community Intelligence
- › Chapter 36. Climate Risk, Adaptation and Resilience Intelligence

Part VII — Supply Chain, Policy, Legal, Economics and Finance

- › Chapter 37. Value Chain, Supply Chain and Geopolitical Intelligence
- › Chapter 38. Policy, Regulation and Incentive Intelligence
- › Chapter 39. Legal, Contracting and Risk-Allocation Intelligence
- › Chapter 40. Unit Economics, CAPEX, OPEX and Return Analysis
- › Chapter 41. Investment, Sustainable Finance and Bankability Intelligence

Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

- › Chapter 42. Scenario Analysis and Future Intelligence
- › Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans library-platform majors, RFID-self-service makers and discovery-service providers. Deal activity — platform consolidation, discovery partnerships and consortium contracts — signals a market consolidating around bankable, repeatable platforms.

Representative players profiled in the full report:

Clarivate Plc (Ex Libris / ProQuest) · OCLC, Inc. · SirsiDynix, Inc. · Bibliotheca Group GmbH · Koha (open-source community) · and 20+ further profiled players across platforms, components and integration.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a Go / No-Go / Conditional-Go investment verdict.

KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global library digital infrastructure market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How does cloud LSP migration change economics versus on-premise ILS?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the technology align with the SDGs and emerging disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most library-tech studies stop at licences and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.

- › **Triangulated sizing** — every market read so value, libraries and collection size reconcile rather than conflict.
- › **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- › **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- › **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- › **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- › **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear Go / No-Go / Conditional-Go investment verdict.

WHO SHOULD BUY THIS REPORT

Investors and PE funds, library-platform and discovery vendors, RFID and self-service manufacturers, academic, public and national libraries, consortia, research institutions, policymakers, and corporate strategy and ESG teams.

ACCESS THE FULL REPORT

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

WANT THE COMPLETE DETAILED TABLE OF CONTENTS?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.