

Canalys Managed BDR Leadership Matrix 2025

Summary

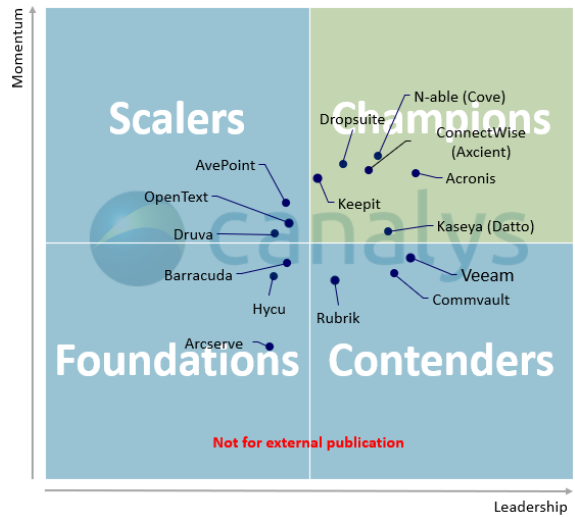
Six vendors have been crowned Champions in the 2025 Canalys Managed BDR Leadership Matrix: Acronis, ConnectWise (Axcient), Dropsuite, Kaseya (Datto), Keepit and N-able (Cove). Three of these vendors, Acronis, Kaseya (Datto) and N-able (Cove) retained their Champion status from the previous edition of the Canalys BDR Channel Leadership Matrix – an impressive achievement.

Champions demonstrated the highest levels of excellence in channel and technology capability over the last 12 months compared with their industry peers, as rated by channel partners and Canalys analysts. Other vendors are classified as **Contenders** (with high ratings based on channel performance, but declining or flat on last year), **Scalers** (improvements in partner sentiment, but yet to achieve the highest levels of consistency in channel excellence) or **Foundation** vendors, which have the lowest ratings and have also suffered a deterioration in partner sentiment over the last 12 months.

This report defines backup and disaster recovery as technology (hardware or software) that creates exact copies of data across one or multiple platforms and/or applications for the purposes of restoration in the event of loss, theft or encryption.

Backup and disaster recovery products have taken on greater importance in a time of ransomware growth, cyber insurance, regulation and increasingly complex SaaS technology stacks, and MSPs are on the front line of this customer struggle. These vendors combine ease of use and delivery with a more MSP-focused mindset. Enterprise backup and storage vendors have found it hard to address the needs of MSPs from technology, pricing or go-to-market standpoints. Therefore, it is important to view vendors through an MSP-centric lens and rate their capabilities along these defined lines.

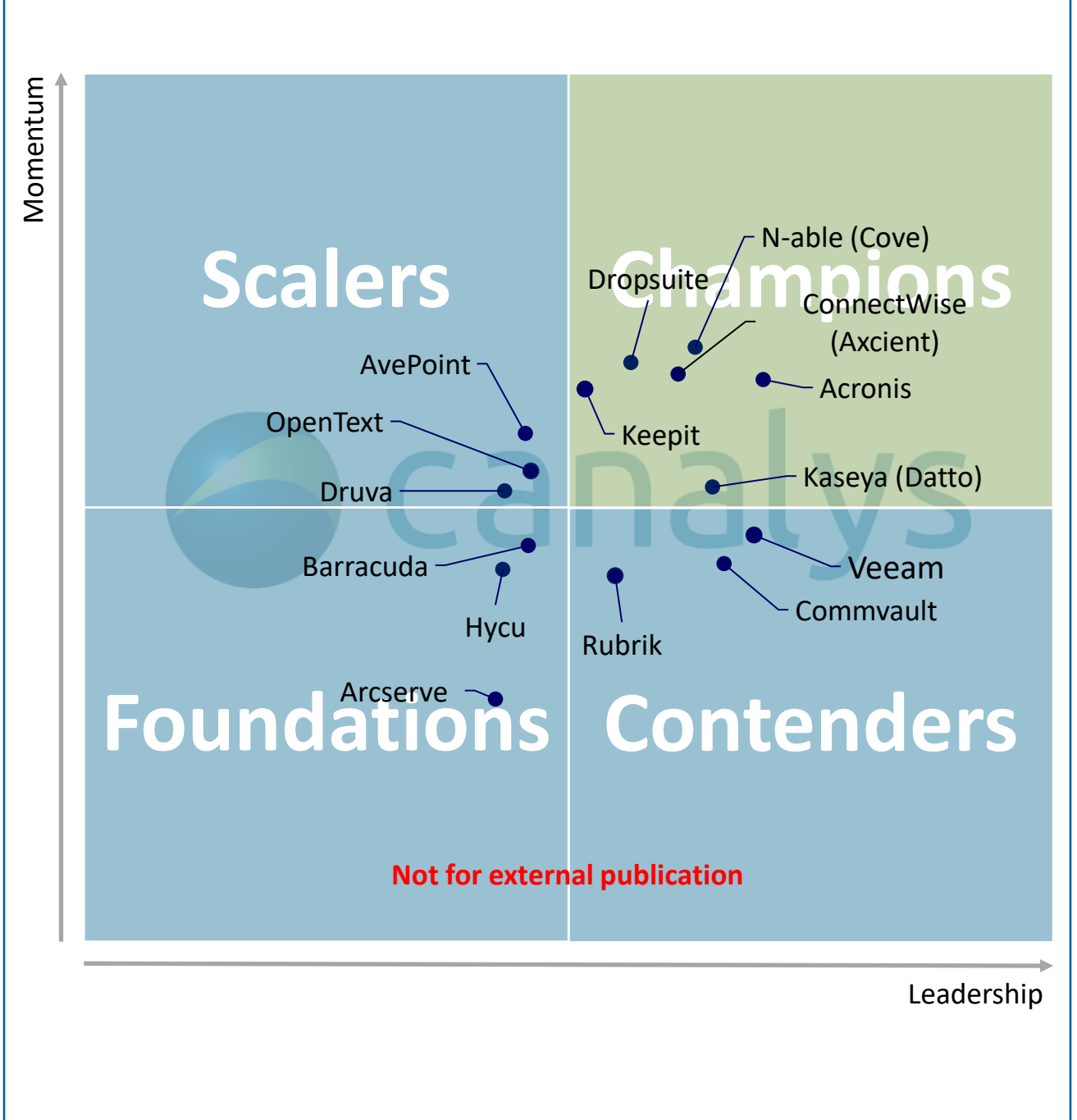
Global managed BDR Leadership Matrix 2025



Managed BDR Leadership Champions 2025

Canalys Managed BDR Leadership Matrix 2025

Global Managed BDR Leadership Matrix 2025



Performance highlights: Champions

Acronis

Highest-rated metrics

- MSP base: 20,000+
- US\$100 to US\$499 million in annual revenue
- Strong revenue growth
- Strong MSP focus

Leadership score: **70%**

Momentum score: **65%**

- **Acronis** has long been known for providing backup and disaster recovery tools to the MSP channel, but in recent years has been building its platform capabilities, expanding its cybersecurity technology offering and launching RMM and PSA tools.
- Its technology strategy along with positive MSP feedback for its ease of doing business has helped it retain its position as a Champion in the Matrix.
- Acronis demonstrates leadership in the MSP channel and a continued commitment to building out its toolset.



CONNECTWISE

Highest-rated metrics

- MSP base: 30,000+
- US\$100 to US\$499 million in annual revenue
- Strong revenue growth
- Strong MSP focus

Leadership score: **62%**

Momentum score: **65%**

- **ConnectWise** did not previously provide backup technology of its own until it acquired Axcient in 2024; Axcient's strength in the MSP channel as a provider of key backup and disaster recovery technology, along with its ease of doing business and support strength, has made it a Champion in the Matrix.
- ConnectWise is building significant platform capabilities for MSPs, with a broad suite of tools and recently changed CEO, as Manny Ravelo (former Forcepoint) took over from Jason Magee.
- ConnectWise must now execute its acquisition and maintain Axcient's good standing in the MSP community.

Performance highlights: Champions

Dropsuite

Highest-rated metrics

- MSP base: 4,500+
- US\$32 million in ARR
- Strong revenue growth
- Strong MSP focus

Leadership score: **57%**

Momentum score: **67%**

- **Dropsuite** provides SaaS backup and disaster recovery technology for M365 and Google Workspace for MSPs. It receives particularly good feedback from MSPs in its ease of doing business and its support capabilities.
- **NinjaOne**, a provider of RMM technology, recently announced its intention to acquire Dropsuite. NinjaOne had been providing server and workstation backup for MSPs and is looking to acquire Dropsuite for its SaaS backup capabilities, particularly for M365 and Google Workspace. This brings NinjaOne closer to the platform positioning of fellow vendors Acronis, ConnectWise, Kaseya and N-able.

Kaseya®

Highest-rated metrics

- MSP base: 25,000+
- Over US\$1 billion in annual revenue
- Good revenue growth
- Strong MSP focus

Leadership score: **65%**

Momentum score: **52%**

- **Kaseya's** acquisition of Datto in 2022 brought it one of the most respected backup and disaster recovery products in the MSP community. While Kaseya offers its own BDR offerings, it is the Datto portfolio that has made it a Champion in this Matrix.
- Datto's backup tools continue to be in demand from MSPs and the product is still well-considered by channel partners, who will be hoping for continued investment in the product and features under new CEO Manny Ravelo.
- The BDR product was over 60% of Datto's total revenue, which was US\$619 million in its last published annual results. In the two full years since, the product continues to see growth and is strong both for internal IT teams as well as MSPs.

Performance highlights: Champions



Highest-rated metrics

- MSP base: 5,000+
- US\$100 to US\$499 million in annual revenue
- Good revenue growth
- Strong MSP focus

Leadership score: **52%**

Momentum score: **64%**

- **Keepit's** evolution to Champion in the Matrix has come as a result of its investment in the channel, geographical expansion, positive MSP feedback and product advancements.
- Keepit made several updates in 2024, launching its Keepit Partner Network, including moving from a "partner first" to a "partner only" go-to-market motion, appointing a new Chief Product Officer to oversee SaaS data protection, building relationships with cloud marketplace distributors and investing in new data centers.
- The company regularly shares assets and webinars for MSPs on areas such as cyber resiliency, cyber insurance and compliance strategies, information which is well received by MSPs.



Highest-rated metrics

- MSP base: 25,000+
- US\$100 to US\$499 million in annual revenue
- Good revenue growth
- Strong MSP focus

Leadership score: **63%**

Momentum score: **68%**

- **N-able** has been investing heavily in its backup and disaster recovery tools since it rebranded these to Cove Data Protection. This now makes up the largest proportion of its revenue, a mark of its success and it made over US\$130 million in 2024 from Cove alone.
- N-able, like its peers in the MSP vendor space, positions its backup solutions as part of an overall platform strategy, seeking to be one of the primary points of customer management.
- It has approximately 25,000 MSPs in its channel, making it one of the most strategic vendors in that community, through its RMM and cybersecurity capabilities, particularly following its acquisition of Adlumin which provides XDR, MDR, and SIEM technology.

Performance highlights: Contenders and Scalers

Summary: Contenders

Commvault has long been known as a key vendor in enterprise backup and disaster recovery, but in recent times has accelerated its relevance for MSPs with its cloud backup portfolio Metallic. Its enterprise legacy means Metallic integrates across a wide range of cloud service providers, VM vendors and SaaS applications, and is perhaps better suited to more complex managed services use cases and MSP partners with larger businesses. The company's MSP Partner Advantage Program is relatively new, having been launched in mid-2021, but has already attracted a good number of MSPs. It is mostly focused on Azure Active Directory, Identity and large database use cases for larger service providers.

Rubrik went public in 2024. As of the third quarter of fiscal year 2025, Rubrik reported a 38% year-over-year increase in Subscription Annual Recurring Revenue (ARR), reaching US\$1 billion. The company offers the Rubrik Acceleration MSP Program (RAMP) to help MSPs deploy and protect customer environments. Rubrik's platform provides a multi-tenant Zero Trust Data Protection and cyber resilience solution, enabling MSPs to deliver Cyber Resiliency-as-a-Service (CRaaS) to their clients.

Veeam's MSP go-to-market motion is centered on its Veeam Cloud & Service Provider (VCSP) program, offering consumption-based licensing. Veeam provides multi-tenancy within Veeam Service Provider Console (VSPC), allowing centralized monitoring, automation via REST APIs and tenant billing integration. Veeam's integrations with hyperscalers, SaaS and storage vendors provide MSPs with more deployment options. Veeam focuses on a pure backup and recovery approach, lacking built-in cybersecurity features, but does integrate with existing MSP vendors like ConnectWise and Kaseya.

Summary: Scalers

AvePoint's MSP business is still relatively new but growing quickly due to investment. The AvePoint Elements platform provides multi-tenant SaaS backup, migration and governance solutions for MSPs managing Microsoft 365, Dynamics 365, and Azure environments. AvePoint specializes in SaaS data protection and integrates with ConnectWise and Kaseya for billing and management, while its proprietary storage model simplifies onboarding but can limit flexibility for MSPs wanting direct cloud storage control. AvePoint's governance and compliance capabilities make it a good choice for MSPs serving regulated industries, though it lacks some support for hybrid and on-premises workloads.

Druva focuses on SaaS data protection using AWS as the underlying storage and compute layer. Druva provides consumption-based backup-as-a-service with a multi-tenant customer management portal. It integrates with RMM and PSA tools, but its reliance on AWS storage can limit cost control compared to vendors that allow bring-your-own-storage options. Compared to some other vendors' workload coverage or SaaS governance features, Druva provides a simpler approach for MSPs prioritizing ease of management over customization and hybrid support.

OpenText acquired Micro Focus and Carbonite (which included Webroot), for enterprise and SMB backup solutions, as well as a number of other vendors in recent years, such as Zix/AppRiver. The company is currently on a consolidation journey, positioning these acquired solutions within the OpenText Cybersecurity brand. Its brands are relevant to MSPs, but it is still to be seen how it will develop these and invest in product innovation and its MSP channel.

Canalys BDR Leadership Matrix 2025

About the Canalys Leadership Matrix

Analyst assessment

Ecosystem feedback

Performance metrics

The Leadership Matrix assesses which vendors are playing an integral role in driving the success of the partner ecosystem. It takes in three primary types of inputs:

- **Analyst assessment:** Scoring of channel vision and strategy, programs and execution, portfolio competitiveness and new launches, M&A activities, and recent and future channel initiatives. This is based on ongoing analyst briefings and analysis of vendor surveys (where applicable).
- **Ecosystem feedback:** Feedback from the partner community, including analyst-led interviews and Candefero Vendor Benchmark ratings for the latest 12-month period (where applicable). Partner feedback focuses on programs and enablement metrics, sales engagement metrics and partner experience.
- **Performance metrics:** Assessment of vendor growth and market share within peer groups for the latest 12-month period compared with the previous 12-month period. This is based on data from Canalys' quarterly shipment tracking services.

Each of these metrics feeds into a proprietary Canalys Leadership Matrix model, which produces a series of scores. This includes an overall **leadership score**, representing the current standing, as well as a **momentum score**, representing the degree of change. The results of the scoring determine the positioning of each vendor in one of four categories:

- **Champions:** Vendors with high ratings in the areas assessed, which have shown both continued improvement in management, strategy and execution, and a commitment to driving future improvements.
- **Contenders:** Vendors with high ratings in the areas assessed, but which have been outpaced by other competitors or peers.
- **Scalers:** Vendors with lower ratings in the areas assessed, but which have seen improvements in sentiment and performance.
- **Foundations:** Vendors with a foundation in the areas assessed, but which currently have lower sentiment and performance levels compared with their peers.

The **Canalys BDR Leadership Matrix** focuses on vendors active in the MSP channel. The minimum qualification criteria for vendors is at least US\$25 million in annual BDR revenue, they must have a dedicated MSP g2m motion for SaaS data protection and 50% of revenue must come from the channel.

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