Open Innovation (OI) supports companies in systematically collaborating with external partners, offering various advantages. However, companies still face several challenges when applying OI, e.g., identifying relevant OI partners, collaboration methods, and project risks. Often, insufficient planning is the reason for subsequent deficits in OI projects. The analysis of relevant context factors ("situation") is important, which affect and constrain OI. To date, a general approach for analyzing (open) innovation situations or guidelines for developing one do not exist. Usually researchers develop their own situation analysis, including extensive literature reviews and experiencing similar challenges. This publication sets the basis for successfully planning OI projects. It focuses on developing an analysis approach for OI situations and supports other researchers in developing their own analysis approaches. The resultant objectives of the publication are to: (1) provide a list of potential situation analysis criteria; (2) provide a guideline for developing a situation analysis; (3) provide initial indications of relevant OI-specific situation criteria. The criteria were
derived from the literature and qualitatively evaluated by three industry partners to assess their usability. Although this work is exploratory, and the results are not automatically generalizable, it is an important contribution for ensuring the success of OI, and for analyzing enablers and barriers to knowledge transfer from academia to industry.

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