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Article

Calibrating Marketing Adaptation Along the Global Value Chain: A Marketing Adaptation Index for Export-Oriented Textile Firms in Uzbekistan

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Abstract: Export-oriented textile producers in emerging economies are moving from yarn and fabric towards finished and own-brand goods. Each step up the value chain hands the firm marketing decisions that a lead buyer used to take. This paper asks how much a firm should adapt its marketing programme to a foreign market at each stage, and how that degree can be measured and managed.

The paper synthesises the standardisation and adaptation literature with global value chain (GVC), dynamic-capability and institutional theory, derives five propositions, and develops a three-stage calibration model (diagnose, calibrate, monitor). It specifies a Marketing Adaptation Index (MAI) that scores realised adaptation of the four marketing-mix elements on a 0–1 scale with analytic-hierarchy-process weights, and a Required Adaptation Index (RAI) that benchmarks the level a venture's value-chain position, institutional distance and product type call for. The framework is illustrated with UN Comtrade and national statistics for Uzbekistan's textile exports, 2017–2025, and a validation protocol is set out for textile exporters in the Bukhara region.

Uzbekistan's revealed comparative advantage in textiles and clothing rose from 3.95 in 2017 to 5.47 in 2023, while the share of finished goods in textile exports climbed from about 39 per cent in 2024 to 52 per cent in January to November 2025. The framework shows why this upgrading raises the required degree of adaptation and shifts its locus from technical product attributes to communication, branding and distribution. Performance is argued to depend on fit, that is, on the gap between realised and required adaptation, rather than on adaptation as such.

The propositions and the index await firm-level testing; thresholds for the adaptation gap are provisional until the pilot study reported in the protocol is completed.

Managers obtain an element-by-element diagnostic that tells them where to standardise and where to adapt for a given market; policy makers obtain a yardstick for export-promotion instruments tied to the national target of US$4.0 billion of textile exports in 2026.

The paper joins two literatures that rarely meet, GVC upgrading and marketing-programme adaptation, and converts the strategy fit argument into a measurable gap that can be tracked over time.

Keywords: marketing adaptation; standardisation; export marketing strategy; global value chains; strategy fit; textile and apparel industry; Uzbekistan

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1. Introduction

In 2024 Uzbekistan exported almost US$2.9 billion of textile products, 10.6 per cent of its merchandise exports; cotton yarn (US$1.237 billion) still exceeded finished textile goods (US$1.124 billion) [1]. Eleven months later the picture had changed: in January to November 2025 finished textile products made up 52 per cent of a smaller export total of about US$2.3 billion, and yarn only 28 per cent [2]. The sector's regulator reports US$2.6 billion of textile exports for the full year 2025, growth of 18.5 per cent in finished-product exports, 1,409 exporting enterprises (502 of them new) and a government target of US$4.0 billion for 2026, of which US$700 million is to be sold through electronic trading platforms [3]. The industry is therefore being pushed up the value chain by policy and by market conditions at the same time, and it is being asked to do so while total textile exports fall.

This shift matters for marketing theory because a yarn exporter and a garment brand do not face the same adaptation problem. A spinner sells a homogeneous, technically specified product to industrial buyers; what it must adapt is documentation, certification and credit terms. A firm that sells its own label in Moscow, Istanbul or Berlin must adapt sizing, design, price positioning, channel and communication, and it must do so under rules on chemical content, labelling and due diligence that differ by market.

Research on this problem has moved from asking whether a firm should standardise its marketing programme to asking how far it should adapt it. Buzzell [4] and Levitt [5] made the case for standardised global marketing, Quelch and Hoff [6] treated the choice as a matter of degree, and Jain [7] set out the contingencies (target market, market position, nature of the product, environment and organisation) that determine where on that continuum a firm should sit. Studies of export ventures then linked product and promotion adaptation to firm, industry and market characteristics and to venture performance [8], [9], and the meta-analysis and review that followed concluded that neither standardisation nor adaptation is superior in itself: the outcome depends on the match between the strategy and its context [10], [11]. Studies of strategy fit made this precise, showing that performance rises when the degree of standardisation matches the similarity of the home and host environments [12] and that the same holds for export product strategy [13]; following Venkatraman [14], fit in this sense is the absence of deviation between an actual and an ideal profile. Measurement advanced with the STRATADAPT scale [15] and with the notion of a combined "AdaptStand" practice [16]. Yet reviews covering five decades of research find that most studies still treat adaptation as a single aggregate, rarely separate the required from the realised level, and give firms no benchmark against which to calibrate the degree of adaptation [17], [18].

A second body of work explains why the adaptation problem is not the same for every exporter in one industry. Apparel is a buyer-driven chain in which retailers and brand owners control design, branding and distribution while manufacturers compete on cost and delivery [19], and most developing-country garment suppliers are tied to lead firms in captive relationships that leave them little marketing autonomy [20]. Functional upgrading, the move from original equipment manufacturing (OEM) to original design (ODM) and own-brand manufacturing (OBM), is the step at which marketing decision rights pass from the buyer to the supplier [21].

Whether a firm can carry out the adaptation that its position calls for depends on its resources and on the dynamic capabilities with which it senses opportunities abroad and reconfigures its routines [22]–[25]. A central capability is export market orientation (EMO), that is, the ability to generate and disseminate intelligence about foreign markets and to respond to it [26]–[28]. Even young and small firms can acquire it [29], although market knowledge still accumulates with experience and with insidership in relevant networks [30], [31]. What a market demands is in turn shaped by its institutions [32] and by the institutional distance between the home and the host country, which sets the

legitimacy requirements a foreign firm must meet [33]–[36]. For Uzbek textile exporters this distance has recently shifted. The country joined the EU's GSP+ arrangement in April 2021 [37], and the international boycott of Uzbek cotton ended in March 2022 after the ILO found the 2021 harvest free of systemic forced and child labour [38], [39]. Both events lowered administrative distance to Western markets but raised the compliance content of what exporters must adapt.

The adaptation and value-chain literatures are seldom read together. As a result, we lack a theory of how the *required* degree of adaptation moves as a firm climbs from yarn to own-brand goods, and we lack an instrument that measures *realised* adaptation in a way that can be compared with that requirement.

This paper addresses three questions. First, how does a venture's position in the textile value chain change the degree and the locus of marketing adaptation that a foreign market requires (RQ1)? Second, how can the degree of marketing-mix adaptation be measured as a single, decomposable index that is comparable across firms and target markets (RQ2)? Third, how should the fit between realised and required adaptation relate to export performance (RQ3)?

The paper is conceptual in the sense of MacInnis [40] and follows the "model" approach described by Jaakkola [41]: it integrates constructs from several theories into a framework with testable propositions and specifies how the central construct is to be measured. It makes four contributions. It links GVC upgrading to the adaptation decision and shows that upgrading changes not only how much a firm must adapt but which marketing-mix elements carry the adaptation. It proposes the Marketing Adaptation Index (MAI), built on the STRATADAPT tradition [15], and pairs it with a Required Adaptation Index (RAI) so that the strategy fit argument of Katsikeas et al. [12] and Hultman et al. [13] becomes a measurable gap. It embeds both indices in a three-stage management process (diagnose, calibrate, monitor) that treats adaptation as something to be set to a level, not maximised. And it grounds the framework in a context that international marketing research has largely ignored: a Central Asian cotton economy whose textile exports grew at 16 per cent a year between 2017 and 2023 while its revealed comparative advantage in the sector rose from 3.95 to 5.47 (authors' calculations from World Bank WITS/UN Comtrade data [42]).

The remainder of the paper is organised as follows. Section 2 states five propositions and presents the conceptual framework. Section 3 specifies the two indices, the measurement model and the validation protocol for a study of textile exporters in the Bukhara region. Section 4 illustrates the framework with secondary data on Uzbekistan's textile export performance. Section 5 discusses implications and Section 6 concludes.

1.1 Conceptual framework and propositions

The framework rests on five propositions that follow from the strands of research outlined in the Introduction. Each is stated together with the argument that supports it.

Functional upgrading in the sense of Humphrey and Schmitz [21] changes both the amount and the locus of the adaptation a venture must perform. A yarn exporter adapts certificates and payment terms, a fabric exporter adds colour, weight and finishing specifications, an OEM garment maker adapts to the buyer's technical package, an ODM supplier adapts design to the buyer's market, and an OBM firm must adapt the entire programme to the end consumer. For industrial textile inputs the adaptable elements are the technical and transactional attributes of the product and its price; for consumer goods they are design, sizing, brand positioning, channel and communication [7]. The upgrading now under way in Uzbekistan, where finished goods rose from about 39 to 52 per cent of textile exports between 2024 and the first eleven months of 2025, is therefore also a change in the adaptation task that exporters face.

Proposition 1. The degree of marketing adaptation a foreign market requires increases with the venture's functional position in the textile value chain (yarn and fabric

< OEM < ODM < OBM), and the locus of required adaptation moves from product-technical and price attributes towards design, distribution and communication.

Whether a venture delivers the adaptation its position requires depends on its capabilities. Firms with higher export market orientation learn faster what a market requires and reconfigure the marketing mix accordingly [25], [28], and market knowledge accumulates with experience in the target market [31].

Proposition 2. For a given required level of adaptation, ventures with higher export market orientation and stronger dynamic marketing capabilities realise a degree of adaptation closer to the requirement; the adaptation gap narrows with EMO and with export experience in the target market.

The requirement itself is set largely outside the firm. For a textile exporter the administrative and regulatory dimension of institutional distance is the most immediate: the European Union's chemical, labelling and due-diligence rules, the technical regulations of the Eurasian customs area and the compliance audits that lead buyers impose translate directly into product, documentation and communication requirements [34], [36].

Proposition 3. The required degree of adaptation rises with the institutional distance between the home and the target market; for industrial textile products regulatory distance dominates, while for consumer products cultural and economic distance add to the requirement.

If adaptation costs money and standardisation saves it, then the profitable level is the one the market requires and no more. Under-adaptation loses orders, listings and legitimacy; over-adaptation wastes scale economies and dilutes brand consistency [12], [13]. Export performance should therefore be a function of the *gap* between realised and required adaptation, and the gap should be examined element by element, because a venture can be well adapted on price and under-adapted on communication at the same time.

Proposition 4. Export-venture performance decreases with the absolute gap between realised and required adaptation; the relationship holds for financial measures (export sales growth, export profitability) and for managers' satisfaction with the venture.

Proposition 5. For ventures in the process of functional upgrading from OEM towards ODM and OBM, the adaptation gap is largest in the communication and distribution elements and smallest in the product-technical element.

The propositions share a logic: adaptation has a required level set by the venture's position, its market and its product; a realised level set by what the firm actually does; and a performance outcome driven by the distance between the two. Figure 1 arranges that logic as a management process with three stages.

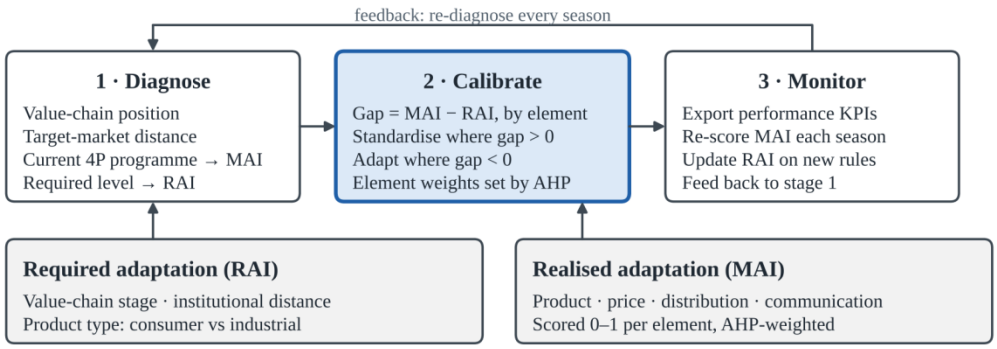


Figure 1. The three-stage calibration model: required and realised adaptation feed a diagnosis, the gap is closed element by element, and performance feeds back. Source: authors.

The first stage, *diagnose*, establishes where the venture stands. It locates the venture in the value chain (yarn, fabric, OEM, ODM or OBM), scores the institutional distance of the target market, classifies the product as industrial or consumer, and from these inputs derives the Required Adaptation Index. In parallel it audits the current marketing programme for the target market element by element and computes the Marketing Adaptation Index. The two inputs are kept apart on purpose: one describes the task, the other the firm's answer to it.

The second stage, *calibrate*, is where the model departs from the usual advice to "adapt where necessary". The gap between realised and required adaptation is computed for each of the four marketing-mix elements. A positive gap means the firm adapts more than the market requires and can standardise to recover scale; a negative gap means it adapts too little and must invest. Because the elements do not matter equally for every product and market, the element weights are elicited from managers and experts with the analytic hierarchy process [43], [44], so that a gap in communication for an own-brand garment venture weighs more than the same gap for a yarn venture.

The third stage, *monitor*, closes the loop. Export performance is tracked with the venture-level measures recommended by Katsikeas et al. [45], [46], the MAI is re-scored each season as collections, prices and channels change, and the RAI is updated when rules change, for example through a new EU due-diligence obligation, a change in technical regulation in a customs union, or a lost or gained preference. The results of monitoring return to the diagnosis of the next season, so adaptation is managed as a setting that is adjusted rather than a one-off strategic choice.

Three features distinguish the framework from existing treatments. It separates the required from the realised degree of adaptation, which Schmid and Kotulla [17] identified as a persistent weakness of the field. It makes the value-chain position an explicit determinant of the requirement, bringing the GVC literature into the adaptation decision. And it defines fit as a signed, element-level gap that can be aggregated, compared across ventures and tracked over time, which is what the strategy fit studies measured only indirectly through interaction terms.

2. Materials and Methods

2.1 Research design

The study follows the instrument-development logic of Churchill [47]: domain specification from the literature, item generation, expert purification, pilot testing, and assessment of reliability and validity, followed by a nomological test against export performance. The unit of analysis is the export venture, that is, one firm's marketing of one product line in one foreign market, as in Cavusgil and Zou [9], because the same firm adapts differently for Russia and for Germany. The empirical setting is the textile industry of the Bukhara region of Uzbekistan, one of the country's cotton-textile cluster regions, where eleven cotton-textile clusters were operating by early 2023 [48].

2.2 The Marketing Adaptation Index

Realised adaptation is measured for each marketing-mix element with multi-item scales adapted from STRATADAPT [15] and from the product and promotion adaptation measures of Cavusgil et al. [8]. Respondents rate each item on a seven-point scale anchored at 1 (identical to the programme used in the home market) and 7 (completely different). The item list is given in Appendix A. For element i the element score is the rescaled mean of its m_i item scores, so that A_i lies between 0 (no adaptation) and 1 (complete adaptation):

$$A_i = \frac{\overline{x}_i - 1}{6}, \quad \text{where } \overline{x}_i = \frac{1}{m_i}\sum_{j=1}^{m_i} x_{ij}$$

The venture-level index is the weighted sum of the four element scores, with weights that sum to one:

$$\mathrm{MAI}_v = \sum_{i=1}^{4} w_i \; A_{v,i}$$

where i indexes product, price, distribution and communication and v denotes the venture. The weights w_i are obtained by the analytic hierarchy process [43], [44]: export managers and industry experts compare the elements pairwise for the venture's product category and market, and the principal eigenvector of the comparison matrix gives the weights; judgements with a consistency ratio above 0.10 are revised. Equal weights ($w_i = 0.25$) serve as the default and as a robustness check. Reporting the four element scores alongside the index keeps the measure decomposable, which is the property Schmid and Kotulla [17] found missing in aggregate adaptation measures.

2.3 The Required Adaptation Index

The required level is not observed; it is benchmarked. Three determinants are scored for each venture. The *value-chain stage* s_v is coded from the venture's product and contractual role (fibre or yarn, fabric, OEM garment, ODM garment, OBM garment). *Institutional distance* $D_v \in [0,1]$ of the target market is a composite built from regulatory distance (technical regulations, chemical and labelling rules, compliance audits), economic distance (income per head and price level relative to Uzbekistan) and cultural distance, each rated by an expert panel on a five-point scale and averaged. *Product type* distinguishes industrial inputs from consumer goods. Table 1 gives the base requirement $b_i(s_v)$ for each element by value-chain stage, derived from the value-chain argument behind Proposition 1 and the contingency evidence of Jain [7] and Leonidou et al. [10]; the element-level requirement is then raised in proportion to institutional distance, with the sensitivity parameter provisionally set at $\delta = 0.3$:

$$\mathrm{RAI}_{v,i} = \min(1,\; b_i(s_v) + \delta \, D_v)$$

The value of δ is to be calibrated in the pilot study.

Table 1. Base required-adaptation levels b_i by value-chain stage and marketing-mix element (0 = fully standardised, 1 = fully adapted). Provisional values derived from the literature; to be validated by the expert panel.

Value-chain stage	Product	Price	Distribution	Communication
Fibre, yarn	0.2 (specifications, certificates)	0.4 (terms, currency, Incoterms)	0.2 (trader or direct B2B)	0.1 (fairs, catalogues)
Fabric	0.4 (weight, finish, colour)	0.4	0.3	0.2
OEM garment	0.5 (buyer's technical package)	0.5 (cost-plus, FOB)	0.3 (buyer-controlled)	0.2
ODM garment	0.7 (design for the buyer's market)	0.6	0.5	0.5
OBM garment	0.8 (sizing, design, label)	0.8 (positioning)	0.8 (own channels, e-commerce)	0.9 (language, brand, media)

The element gap is the signed difference between realised and required adaptation, and the venture's fit is one minus the weighted absolute gap:

$$G_{v,i} = A_{v,i} - \mathrm{RAI}_{v,i}$$

$$F_v = 1 - \sum_{i=1}^{4} w_i \left| G_{v,i} \right|$$

A negative gap signals under-adaptation and a positive gap over-adaptation; a venture is provisionally classed as "fitted" on an element when $\left|G_{v,i}\right| \leq 0.15$, a band to be re-set once the distribution of pilot scores is known.

2.4 Validation protocol

Content validity. Ten judges (five academics in international marketing and five export managers) rate each item as essential, useful or unnecessary; items with a content validity ratio below the critical value for ten judges are dropped or reworded. *Pilot.* The questionnaire is administered to about 30 ventures to check wording, response time and item distributions. *Measurement model.* Internal consistency is assessed with Cronbach's alpha and composite reliability (≥ 0.70), convergent validity with average variance extracted (≥ 0.50) and discriminant validity with the Fornell-Larcker criterion and the heterotrait-monotrait ratio [49], [50]. *Common method bias.* Procedural remedies (anonymity, separated scale formats, performance data from a second informant or from records where available) are combined with a statistical check [51]. *Nomological validity.* Fit should predict export performance measured as export sales growth, export profitability relative to domestic sales and managerial satisfaction over the past three years [45].

2.5 Sampling

The sampling frame combines the register of exporting light-industry enterprises maintained by the Light Industry Development Agency (1,409 exporters nationally in 2025) with the regional lists of cotton-textile clusters and their member firms. Within each firm, up to three export ventures are selected to cover different target-market groups: the Commonwealth of Independent States, Türkiye, the European Union and other markets. The key informant is the export or marketing manager; a second informant (the director or chief accountant) supplies performance data where possible. The target is 120–150 ventures from 60–80 firms, which exceeds the minimum sample for the structural model under the ten-times rule and a power analysis at the 5 per cent level with medium effect sizes.

2.6 Analysis plan

Differences in element scores across market groups and value-chain stages are tested with one-way ANOVA or, where normality fails, the Kruskal-Wallis test. Propositions 2 and 4 are tested in a partial least squares structural model in which fit (and its square, to allow for asymmetry between under- and over-adaptation) predicts performance, with export market orientation and export experience as predictors of the gap and firm size, firm age and value-chain stage as controls. Element-level adaptation profiles are clustered with k-means after a hierarchical solution fixes the number of clusters, to identify the typical adaptation configurations of regional exporters. Export channel efficiency, where channel data are available, is assessed with data envelopment analysis [52].

2.7 An illustrative computation

Table 2 shows how the indices behave for one hypothetical venture: a Bukhara knitwear producer that has moved from OEM to its own label in the Russian market. The figures are illustrative, not survey data.

Table 2. Illustrative calculation for a hypothetical OBM knitwear venture in a low-distance market ($D_v = 0.15$). Realised scores are invented for illustration.

Element	Weight w_i (AHP)	Realised $A_{v,i}$	Required $\mathrm{RAI}_{v,i}$	Gap $G_{v,i}$	Reading
Product	0.30	0.75	0.85	−0.10	Fitted
Price	0.20	0.80	0.85	−0.05	Fitted
Distribution	0.25	0.40	0.85	−0.45	Under-adapted
Communication	0.25	0.30	0.95	−0.65	Under-adapted
Venture	1.00	MAI = 0.56	RAI = 0.88	F = 0.69	

The venture adapts its product and price almost as much as an own-brand position requires, but it still sells through the importer it used as an OEM supplier and communicates with the catalogue it uses at home. The index points to where the next investment should go, which an aggregate adaptation score of 0.56 would not reveal.

2.8 Context: Uzbekistan's textile export performance and value-chain position

2.8.1 Comparative advantage, 2017–2023

Table 3 reports Uzbekistan's exports of textiles and clothing (Harmonised System chapters 50–63) and Balassa's index of revealed comparative advantage [53], computed as the sector's share in the country's merchandise exports divided by the sector's share in world merchandise exports:

$$\mathrm{RCA}_t = \frac{X_{\mathrm{TC},t}^{\mathrm{UZB}} / X_t^{\mathrm{UZB}}}{X_{\mathrm{TC},t}^{\mathrm{W}} / X_t^{\mathrm{W}}}$$

where X_{TC} denotes exports of HS 50–63 and X total merchandise exports of Uzbekistan (UZB) and the world (W) in year t. The data are reporter-declared values from UN Comtrade as compiled in the World Bank's World Integrated Trade Solution (WITS); 2023 is the latest year with world totals.

Table 3. Uzbekistan's textile and clothing exports (HS 50–63) and revealed comparative advantage, 2017–2023.

Year	Textiles and clothing exports, US$ million	Share of Uzbekistan's merchandise exports, %	Share of world merchandise exports held by textiles and clothing, %	RCA	Uzbekistan's share of world textile and clothing exports, %
2017	1 634	16.2	4.10	3.95	0.21
2018	1 547	14.2	3.93	3.60	0.18
2019	1 945	13.0	4.00	3.26	0.23
2020	2 113	15.9	4.11	3.87	0.27
2021	3 157	22.4	3.76	5.95	0.35
2022	3 284	21.5	3.63	5.92	0.34
2023	4 019	19.1	3.49	5.47	0.45

Source: authors' calculations from World Bank WITS/UN Comtrade [42]. HS 50–63 includes raw cotton fibre, so the series is broader than the national "textile industry" statistics used in Section 4.2.

Three facts stand out. Exports of the sector grew two and a half times in six years, a compound rate of 16 per cent a year, while world textile and clothing trade grew by 11 per cent over the whole period. The revealed comparative advantage index, already far above the threshold of unity in 2017, rose to almost six in 2021–2022 and stayed above

five in 2023; the jump coincides with the lifting of the cotton boycott and the start of GSP+ access, that is, with a fall in administrative distance to Western buyers. Yet Uzbekistan's share of world exports in the sector was still below half of one per cent in 2023. The country is a specialised but small supplier, which is the position from which captive OEM relationships are typical [20] and from which functional upgrading is hardest.

2.8.2 Product structure and the upgrading now under way

National statistics describe the composition of textile industry exports (Table 4). In 2024 cotton yarn was the largest item, with finished textile products close behind; in the first eleven months of 2025 the order was reversed, and finished products accounted for more than half of a smaller total. Part of the change in shares reflects the fall in yarn exports rather than growth in garments (the regulator reports finished-product exports up by 18.5 per cent in 2025 while the sector total fell from about US$2.9 billion to US$2.6 billion), but the direction is the one the government's targets prescribe: US$4.0 billion of exports in 2026 with a rising share of finished goods, part of it through e-commerce platforms, under Presidential Decree No. PF-4 of 12 January 2026 on the participation of light-industry enterprises in international supply chains [3].

Table 4. Structure of Uzbekistan's textile industry exports.

Product group	2024, US$ million	2024, share %	January to November 2025, share %
Cotton yarn	1 237	43	28
Finished textile products (garments, home textiles)	1 124	39	52
Knitted fabric	292	10	11
Woven fabrics	146	5	6
Hosiery	43	1	2
Carpets and other	—	—	1
Total textile industry exports	about 2 900	100	about 2 300 (US$ million)

Sources: Statistics Agency of Uzbekistan [1] for 2024 values, shares calculated by the authors; Statistics Agency of Uzbekistan [2] for January to November 2025 shares. The 2024 total of US$2.9 billion equalled 10.6 per cent of merchandise exports; the January to November 2025 total equalled 7.3 per cent.

In the terms of Section 2, the industry is moving its centre of gravity from the first two rows of Table 1 towards the last three, and it is doing so in markets of very different institutional distance. The regulator lists Russia, Türkiye, Belarus, Kyrgyzstan, Kazakhstan, China, Germany and the United Arab Emirates as the main partners and reports first shipments to Algeria, Angola, Greece and Kuwait in 2025 [3]. A garment exporter serving Kazakhstan under Eurasian technical regulations, Germany under GSP+ and EU product rules, and Gulf markets through online platforms faces three different required-adaptation profiles at once. That is precisely the situation in which a single aggregate measure of adaptation misleads and an element-level, market-specific gap is informative.

2.8.3 A note on measurement

The two data sources in this section do not agree on the size of the sector, and the disagreement is instructive for the construct validity argument of Section 3. UN Comtrade's HS 50–63 aggregate for 2023 (US$4.0 billion) includes raw cotton fibre and is compiled from customs declarations; the national "textile industry" series (US$2.9 billion

for 2024) covers the output of processing enterprises. Comparative-advantage indices must therefore be computed from one harmonised source, as in Table 3, while statements about upgrading must rely on the national product breakdown, as in Table 4. The same discipline applies to the firm-level indices: realised and required adaptation must be scored for the same venture, the same market and the same season before a gap can be read.

3. Discussion

3.1 Theoretical implications

The framework changes the question the adaptation literature asks. Six decades of studies have related the degree of adaptation to performance and found the relationship contingent [11], [18]. Treating the required level as a construct in its own right, and performance as a function of the gap, explains why: the same degree of adaptation is the right answer for one venture and the wrong one for another, so a pooled regression of performance on adaptation cannot find a stable coefficient. The fit studies of Katsikeas et al. [12] and Hultman et al. [13] reached this conclusion through interaction terms between strategy and environment; the gap formulation states it directly and makes the "ideal profile" explicit and contestable.

Bringing the value-chain position into the requirement adds a determinant that the contingency lists of Jain [7] and Cavusgil et al. [8] did not contain, because those lists were drawn up for firms that already owned their marketing programmes. For suppliers in buyer-driven chains the first adaptation decision is made by someone else. Functional upgrading, in the sense of Humphrey and Schmitz [21], is therefore also an *adaptation transfer*: with each step the supplier takes over marketing decisions and the required degree of adaptation it must manage rises. Proposition 5 follows from this and offers a testable account of why upgrading so often stalls at the ODM stage: the elements whose adaptation the firm has never practised, namely channel and communication, are exactly those where the gap opens first.

The institutional argument qualifies the Uppsala logic for this setting. Johanson and Vahlne [31] locate the main liability in outsidership from networks; for a textile exporter, administrative distance can fall sharply through policy events that the firm does not control, as GSP+ access and the end of the cotton boycott showed for Uzbekistan. The required level of adaptation then changes for every venture in the industry at once, which is why the framework updates the benchmark in the monitoring stage rather than treating it as fixed.

3.2 Managerial implications

For export managers the practical output is an element-level map rather than a verdict on strategy. A spinner that scores a positive gap on communication is spending on adaptation that its industrial buyers do not reward; a knitwear firm with its own label that scores a large negative gap on distribution is undermining the product and price adaptation it has already paid for. The weights make the map specific to the venture: for a yarn venture the AHP will typically load price and product, for an own-brand venture communication and distribution, so the same numerical gap carries different urgency. Because the index is re-scored each season, managers can also see whether an investment in, say, a localised online storefront has moved the gap, which a sales figure alone cannot attribute.

The regional case suggests three uses. Firms upgrading from OEM to ODM for CIS buyers can use the rubric to check that design adaptation is matched by the certification and labelling that Eurasian technical regulations require. Firms entering the EU under GSP+ can treat the regulatory component of distance as a checklist of mandatory adaptation (chemical compliance, labelling, due-diligence documentation) before

discretionary adaptation is considered. Firms targeting the US$700 million of e-commerce sales in the 2026 plan can apply the distribution and communication items to each platform and market pair, because a marketplace listing is a marketing programme in miniature.

3.3 Policy implications

Export-promotion policy in Uzbekistan has concentrated on finance, certification subsidies and trade fairs. The framework points to an additional lever: measurement. A sector-wide MAI survey, repeated annually alongside the regulator's export register, would show which elements of adaptation the industry under-invests in for each target market and would let support instruments such as design centres, market-intelligence services and platform onboarding programmes be aimed at the largest gaps rather than spread evenly. The revealed-comparative-advantage series also carries a warning. An index above five rests on cotton and yarn; if the share of finished goods keeps rising, the aggregate index may fall even as value added rises, because finished goods compete in a far larger world market. Policy targets expressed in export value should therefore be read together with the product structure, not instead of it.

4. Conclusions

The paper set out to explain how much an export-oriented textile firm should adapt its marketing programme as it moves up the value chain, and how that degree can be measured. Its answer is that adaptation has a required level, set by the venture's value-chain stage, the institutional distance of its market and the type of its product; that the firm's realised level can be scored element by element with a decomposable index; and that performance should follow from the gap between the two rather than from adaptation itself. The three-stage calibration model turns this into a routine that is repeated each season, and the Uzbek evidence (a revealed comparative advantage above five, a finished-goods share that passed one half of textile exports in 2025, and a 2026 target that presupposes own-brand and online sales) shows an industry whose required level of adaptation is rising faster than its experience of managing it.

The limitations follow from the paper's conceptual character. The propositions are untested; the base levels in Table 1 and the sensitivity parameter in equation (3) are judgements drawn from the literature and await the expert panel and pilot described in Section 3; and the thresholds that separate "fitted" from under- and over-adapted ventures can only be set once the distribution of pilot scores is known. The secondary data illustrate the argument but cannot test it: comparative advantage is measured for the sector, adaptation for the venture. Two data issues deserve attention in the empirical stage. Required adaptation is benchmarked by experts and therefore carries their biases; triangulating the panel's ratings with buyer requirements taken from actual technical packages and platform listing rules would strengthen it. And the performance measures rely on managers' reports unless firms open their export records, which small exporters are often reluctant to do.

Three lines of further research follow. The first is the field study itself: 120–150 ventures in the Bukhara region, with the measurement model, group comparisons, structural model and cluster analysis specified above, followed by a replication in a second cluster region to test external validity. The second is longitudinal: scoring the same ventures over several seasons would show whether the gap closes with experience, as Proposition 2 implies, and whether closing it precedes performance gains, which cross-sectional data cannot establish. The third is comparative: the same instrument applied to textile exporters in Türkiye, Bangladesh or Ethiopia, whose positions in the value chain differ, would test whether the required-adaptation rubric travels across institutional settings or needs recalibration in each. The framework will have earned its

place if, in those studies, the gap predicts performance better than the degree of adaptation does.

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