



UZBEKISTAN'S TECHNOLOGICAL PRODUCTS INTRODUCTION TO THE EUROPEAN EUROPEAN MARKET STRATEGIES

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Article history:	Abstract:
Received: 11 th April 2022 Accepted: 11 th May 2022 Published: 22 nd June 2022	The article analyzes the role of Uzbekistan in the European textile market. The types of products that are relatively dominant in the competition in the textile industry of Uzbekistan are determined on the basis of the balsa index. Based on the dynamics of imported textile products from EU countries, Uzbekistan's exports are determined for a certain group of goods. The relevance and importance of the EU (EU) Special Preferences System for Sustainable Development and Good Governance (GSP +) is highlighted. The strategy of diversification of the range of products of local manufacturers of garments and knitwear to the countries of the European Union is proposed.

Keywords: export, industry, textile, garment, competition, relative advantage, diversification, foreign markets, ballast index, marketing, innovative marketing, GSP, GSP +, GSP + regulation, GSP + standards, GSP + beneficiary.

INTRODUCTION

The market to European countries is the most important market for all countries.

METHODOLOGY

In the Republic of Uzbekistan, the implementation of reforms aimed at increasing the export potential of local enterprises producing textile and garment products has been a constant focus of the government. In the post-independence years, Uzbekistan has made many reforms in trade and economic issues with EU countries. In recent years, entering foreign markets, including the EU, has been identified as an important strategic direction.

The EU is one of the world's largest economies. In particular, the union has a population of 185 million, the territory of the member states occupies 14% of the world's land area. The Union accounts for 20% of the world's natural gas reserves, 50% of its exports, 8% of its oil reserves and 18% of its exports, 22% of its coal reserves and 5.1% of the world's electricity generation.¹

The EU was established on 18 April 1951 by France, Germany, Italy, Belgium, the Netherlands and Luxembourg (Benelux) on the basis of the Paris Agreement establishing the European Coal and Steel Community. The agreements on the establishment of the European Economic Community and the European Atomic Energy Community with the participation of these countries were signed in Rome on March 25, 1957 and entered into force in 1958.

Thus, cooperation has been established in key sectors of the economy, and a common market for the free circulation of goods (products) within the Common Customs Union has been introduced. A single space has been created within the communities for the free movement of labor, services and capital. The Maastricht Treaty of 1992 and the Lisbon Treaty of 2007 established a single organization called the European Union instead of the European Communities.

ANALYSIS AND RESULTS

The peculiarity of the EU's foreign trade relations is that its foreign trade turnover is about 200 billion euros a year. ends with a positive balance of euros. The Alliance, which cooperates with 209 countries around the world, trades 4,555 types of products registered in the International Standard No. 6 Harmonized System (HS6).

The first document in the development of cooperation between the Republic of Uzbekistan and the EU was the signing in 1992 of the Memorandum of Understanding. In 1994, diplomatic relations were established between Uzbekistan and European countries. In the same year, the Cabinet of Ministers of the Republic of Uzbekistan adopted a resolution on the establishment of a Technical Cooperation Coordination Bureau of the EU Commission (UzKuroCES). In 1995, a diplomatic mission of the republic was launched in Brussels as part of the EU Commission.

¹ <https://review.uz/oz/post/ozbekiston-va-eoii-hamkorlikning-istiqbolli-yonalishlari>



Uzbekistan-EU economic and trade relations have a dynamic development trend. Total trade turnover has almost quadrupled over the past 25 years (1994-2021). Although the potential of bilateral trade is wide, the share of Uzbekistan in the total foreign trade turnover of the European Union does not exceed 0.1%.

The first major trade agreement between Uzbekistan and the EU in the field of textiles was signed on June 8, 1993 in Brussels in the field of textiles. The agreement stipulates that the quota for Uzbek textiles will increase by 1.2% annually, and from 2004 the parties agreed to abolish the quota for Uzbek textiles.

Foreign trade relations with the European Union have declined sharply since 2011. The reason is that in 2011 Uzbekistan boycotted the use of child labor and forced labor during the cotton harvest. The campaign was supported by a boycott of 331 international brands and retailers. The boycott has led to a decline in imports of Uzbek products to many European countries. In particular, as a result of the boycott, the main category of goods in Uzbekistan (61 of the TN VED code) has sharply decreased imports of knitted or knitted garments and accessories from European countries (Figure 1).



Figure 1. Imports of knitwear from Uzbekistan by some European countries.²

Since 2017, relations between Uzbekistan and the EU have developed significantly. The EU attaches great importance to Uzbekistan's integration into the world economy, especially through its membership in international economic structures. As of November 11, 2019, the European Union has allocated a grant of 5 million euros for Uzbekistan's accession to the World Trade Organization (WTO). These funds will be used to prepare the necessary documents for the accession process, to increase the knowledge of Uzbek specialists on WTO agreements and the international trade system.

In April 2021, the EU Special Preference System for Sustainable Development and Good Governance (GSP +) came into force for Uzbekistan. This system will increase the ability of Uzbekistan to export textile products to the EU, the largest market with a population of more than 510 million people (2020), to export 6,200 types of products without customs duties.

The Generalized System of Preferences (GSP) is a system of preferential customs tariffs applied by developed countries to goods exported from developing

countries in order to increase their economic growth and export potential.

Generalised Scheme of Preferences Plus (GSP +) not only helps to increase exports, but also to improve the country's performance in various fields, introduce modern standards and technologies, acquire the necessary knowledge and skills, ensure the required level of quality, in short, organize production change their approach to import and export.³

The GSP + regulation is a unilateral trade mechanism that removes or reduces import duties on products from developing countries into the European Union, eradicating poverty, promoting sustainable development and their participation in the global economy. The GSP + program aims to promote sustainable economic growth in low-income countries and offers new opportunities to participate in environmental and good governance issues. The new GSP + system will strengthen the EU's ability to create economic opportunities and take advantage of trade incentives for sustainable development. The United States, the European Union (EU), and other developed

² <https://www.trademap.org/> - based on the data

³ Uzbekistan has joined GSP +. What does this mean for the textile industry in Uzbekistan?

<https://review.uz/uz/post/prognoz-i-perspektiv-sistem-preferency-gsp-dlya-tekstilnoy-industrii-uzbekistana>



countries have been pursuing similar programs since the 1970s to stimulate economic growth in developing countries.

The European GSP system is the most advanced of the systems used by developed countries. The GSP system has a three-way tariff system. In particular, the first system is GSP standards for low- and middle-income countries. This means partial or complete removal of customs duties on two-thirds of the tariff lines. As of January 1, 2019, 15 countries are members of such agreements. The Partnership and Cooperation Agreement signed between Uzbekistan and the European Union in 1996 is the main document regulating relations. In this agreement, Uzbekistan is admitted to the European Union's Generalized System of Preferences (GSP).⁴

The second standard is GSP +, which is a special incentive program for sustainable development and good governance. It envisages a 0% reduction in tariffs for low- and low-income countries, which implement 27 international conventions on human rights, labor rights, environmental protection and good governance. According to this standard, in 2019, a total of 8 countries (Armenia, Bolivia, Cape Verde, Kyrgyzstan, Mongolia, Pakistan, the Philippines, Sri Lanka) were full members. From April 2021, Uzbekistan has joined the list.

The third is the EBA (Everything But Arms), a special agreement for developing countries that provides duty-free, quota-free access to all products except weapons and ammunition. Agreements on such a standard have been made with about 50 countries around the world.

To adopt GSP + standards, states must implement 27 international conventions, including: 7 - in the field of human rights, 8 - in the field of labor standards, 8 - in the field of environmental protection, 4 - in the field of effective governance. According to the procedure established by the European Union, a formal application by the country for benefits under this system can be submitted after the full ratification of the above-mentioned international conventions. In return, the EU will reduce import duties to zero percent for more than two-thirds of its export tariff lines.

Acceptance of Uzbekistan as a beneficiary of GSP + is a result of ongoing reforms by the government, in particular to improve the business environment, the judiciary, security services, working conditions, administrative accountability and efficiency. This is

evidenced by the consistent positive development in the socio-economic and labor spheres. In particular, Uzbekistan has done a lot to eliminate the systematic use of child labor in the cotton harvest and production processes. The International Labor Organization (ILO) has confirmed in 2018 and 2019 that third-party monitoring has eliminated the systematic or systematic use of child labor in the cotton harvest. According to the ILO's third-party monitoring of the 2019 cotton harvest, the systematic or systematic use of forced labor by adults has also been eliminated. These results were confirmed in the ILO's latest report on third-party monitoring of the 2020 cotton harvest, published in January 2021.⁵

The significant increase in exports of industrial products such as textiles, chemicals and food products in Uzbekistan over the past 20 years testifies to the growing diversification of exports.

According to estimates by the international portal GSP Hub, in 2020 the per capita income of the population of Uzbekistan amounted to 1740 US dollars. Uzbekistan's total exports to European countries amounted to 174 million euros in 2020, while preferential imports to Europe according to GSP standards exceeded 90 million euros, which is 50% of total exports.

Uzbekistan ranks 7th in the world in the production of 713 thousand tons (2019) of cotton fiber. The textile industry of Uzbekistan is one of the drivers of the country's industry. According to the Association of Textile Industry, in 2020, 102 enterprises exported \$ 74 million worth of textiles to the European Union, which is 136.4% more than in 2019 (\$ 53.3 million in 2019).

With the introduction of the GSP + system, exports are expected to increase to \$ 242.2 million by 2022, up from \$ 142.1 million in 2021.

Under the GSP + system, Uzbekistan was able to export 3,000 items without customs duties and 3,200 items on the basis of reduced customs duties to the markets of EU member states.

The level of GSP benefits in Uzbekistan is currently 87%. The product segments that benefit from the abbreviated benefits are mainly textiles and clothing, plastic products, as well as fruits, nuts and vegetables. This shows that the country's export structure is more diversified than its neighbors in Central Asia.

⁴ Uzbekistan will start preparing for GSP + benefits.
<https://kun.uz/news/2021/02/07/uzbekistan-prepares-for-to-use-of-gsp-privileges>

⁵ Third Party Monitoring on Child and Forced Labour in Uzbekistan.

https://www.ilo.org/moscow/projects/WCMS_704979/lang-en/index.htm



In general, the priority strategic goals for the textile industry of Uzbekistan in the context of the pandemic have been achieved. At the same time, the goals set in the Action Strategy for the five priority areas of development of the Republic of Uzbekistan for 2017-2021 have been achieved. The priority is to achieve the goals of the New Uzbekistan Development Strategy for 2022-2026. In particular, it is planned to increase the volume of exports of finished products of national and foreign brands in the textile industry to 5 billion US dollars in 2026, increase the number of jobs in the industry to 570,000, increase the volume of artificial fiber processing to 200,000 tons.

In order to make effective use of the GSP + system, Uzbekistan needs to significantly diversify its export portfolio, as reliance on textiles alone can hinder its export sector, leading to balance of trade problems.

In order to use the diversification strategy, it is necessary to identify the types of target products that are suitable for the European market of Uzbek crowns. It is known that under the preferences of the system of special preferences ("GSP +") Uzbekistan has the opportunity to export more than 6,200 items of goods to the European market without customs duties.

Having a system of incentives does not mean that the export of products will develop on its own. All countries are constantly competing for the European market. India, China and Bangladesh are the leading countries in the European Union in terms of knitwear. However, Uzbekistan has a relative advantage for some

groups of the range of textile, garment and knitted goods.

It is well known that comparative advantage must be taken into account in determining competitive advantage. Of all the known methods of measuring comparative advantage, the most popular is the concept of comparative advantage.

It is possible to determine the comparative advantage in the competitiveness of textile exports of Uzbekistan using the Balassa Index (BI), which is determined as follows:

$$BI_{i,t} = (X_i / X_a) / (X_{wi} / X_{wa}) \quad (1)$$

here:

X_i - volume of Uzbek exports to the EU by the selected product type;

X_a - volume of Uzbek exports to the world by selected product type;

X_{wi} - total exports of Uzbekistan to the EU;

X_{wa} - Uzbekistan's total exports to the world.

For comparative analysis, it is recommended to use general data on the textile garment and knitwear export market for 2018-2020. Because in the official statistics of the World Trade Organization (<https://www.trademap.org/>) since 2017, Uzbekistan has begun to include accurate statistics. It is advisable to determine the comparative advantage according to the TIF TN code (6100-6300). Determined ballast index data are given in Table 1.

Table 1

Calculation of the balsa index of the products of 61,62,63 categories according to the TIF TN code of Uzbekistan

Product code	X_i/X_a	X_i/X_a	X_i/X_a	BI_i^t	BI_i^t	BI_i^t
	2018	2019	2020	2018	2019	2020
'6109	0,02	0,04	0,01	0,8	2,2	0,55
'6104	0,04	0,06	0,02	1,4	3,2	1,13
'6115	0,03	0,03	0,03	1,1	1,8	1,68
'6110	0,04	0,04	0,02	1,7	2,3	1,36
'6103	0,02	0,03	0,02	0,9	1,5	0,97
'6108	0,01	0,01	0,01	0,5	0,6	0,33
'6111	0,01	0,02	0,01	0,2	0,8	0,57
'6114	0,00	0,07	0,12	0,0	3,6	7,10
'6102	0,06	0,01	0,07	2,3	0,3	4,29
'6105	0,01	0,02	0,01	0,3	1,0	0,37
'6106	0,04	0,17	0,03	1,7	9,3	1,52
'6112	0,00	0,00	0,01	0,0	0,2	0,56
'6107	0,00	0,00	0,00	0,1	0,1	0,03
'6117	0,00	0,20	0,00	0,0	10,4	0,00
'6203	0,09	0,20	0,16	3,5	10,4	9,33
'6202	0,37	0,23	0,37	13,9	12,2	21,57
'6210			0,36	0,0	0,0	21,04
'6201	0,13	0,18	0,19	4,8	9,8	11,19

Product code	X_i/X_a	X_i/X_a	X_i/X_a	BI_i^t	BI_i^t	BI_i^t
	2018	2019	2020	2018	2019	2020
'6211	0,09	0,48	0,14	3,3	25,7	8,15
'6204	0,00	0,02	0,03	0,0	0,9	1,88
'6206	0,03	0,00	0,08	1,0	0,2	4,72
'6214	0,00	0,01	0,00	0,0	0,3	0,15
'6205	0,01	0,00	0,00	0,2	0,1	0,04
'6302	0,01	0,01	0,01	0,3	0,6	0,34
'6307	0,00	0,00	0,02	0,0	0,2	0,97
'6305	0,01	0,00	0,00	0,3	0,3	0,17
'6304	0,00	0,02	0,01	0,0	1,2	0,57
'6301	0,25	0,03	0,01	9,5	1,8	0,73

Balassa index data for each type of product helps to determine the possibility of using differentiation strategies of garment and knitting enterprises in Uzbekistan. The following types of products have a high competitive advantage of Uzbekistan in European markets, including:

6102 - Coats for women or girls, coats for car rides, coats, cloaks. Including ski jackets, wind jackets, wind jackets and similar items knitted or sewn from knitwear (except suits, jackets, blazers, shirts, skirts, striped skirts, pants, jackets and coats);

6114 - knitted or crocheted special clothing for professional, sports or other purposes;

6201 - coats for men or boys, coats to wear in the car, caps, overcoats, including ski jackets, wind jackets, wind jackets and similar items (except knitted or crocheted, suits, jackets, blazers and pants)

6202 - Coats for women or girls, coats to wear in the car, caps, cloaks, anoraks, including ski jackets,

wind jackets, wind jackets and similar items (except knitted or crocheted, suits, jackets, blazers and pants)

6203 - Suits for men or boys, ensembles, jackets, blazers, trousers, overalls with jackets and hats, trousers and shorts (knitted or crocheted, wind-sewn jackets and the like, separate vests, sports suits, ski and swimwear mustasno)

6206 - Blouses, shirts and blouses for women or girls (except knitted or knitted and vests)

6210 - garments made of felt or non-woven fabrics, impregnated or non-impregnated, coated or laminated; garments made of rubberized or impregnated, coated, coated or laminated with plastic or other substances (excluding knitted or crocheted, as well as children's clothing and accessories)

6211 - Sports suits, ski suits, swimming suits and other clothing, etc. (knitted or non-knitted)

Table 2 shows the share of Uzbekistan's total exports to EU countries by identified commodity positions.

Table 2
The share of Uzbekistan in total exports by type of products to Europe, %

Товар коди	2018	2019	2020
6102	6,0	0,6	7,3
6114	0,0	6,7	12,1
6201	12,7	18,4	19,0
6202	36,5	22,9	36,6
6203	9,3	19,5	15,8
6206	2,7	0,4	8,0
6210			35,7
6211	8,8	48,2	13,8

From the data in Table 3, it is clear that Uzbekistan still has great potential for the position of goods that have a competitive advantage. However, the EU market has not yet secured a high market share of finished products. All the listed commodity items are exported at GSP + preferential tariffs.

Uzbekistan can achieve a number of positive results while maintaining the existing share of relevant commodity categories. In European markets, there is an opportunity to determine the future by assessing the demand for textiles, garments and knitwear, forecasting the volume of imports.



Taking the forecast values of the European Union based on the dynamics of imports for 2002-2021, Uzbekistan will make forecasts of export opportunities while maintaining the existing market share and the

dynamics of market share in various cases. The form of statistical data collected to make the forecasts is shown in Table 3.

Table 3
TIFTN code №61 (Knitwear or knitted garments and accessories) product export dynamics.⁶

Years	TIFTN code №61 (Knitwear or knitted garments and accessories)			TIFTN -62. Knitwear and non-knitted garments and accessories		
	Total imports in the EU, thousand US dollars	Exports of Uzbekistan, thousand US dollars	Share of Uzbekistan, %	Total imports across the EU, thousand US dollars	Exports of Uzbekistan, thousand US dollars	Share of Uzbekistan, %
2002	36536990	689	0,001886	46195684	3026	0,007
2003	44240572	1865	0,004216	54525975	867	0,002
2004	51494075	2737	0,005315	61330507	1333	0,002
2005	54666241	2372	0,004339	65728805	156	0,000
2006	60490698	8748	0,014462	71161129	238	0,000
2007	69876132	31749	0,045436	79891887	694	0,001
2008	78561260	15252	0,019414	88310413	4683	0,005
2009	71312236	3969	0,005566	78434318	1142	0,001
2010	76331757	2461	0,003224	78773909	48	0,000
2011	86762555	1152	0,001328	91382850	19	0,000
2012	76432581	894	0,00117	80809793	31	0,000
2013	81375258	905	0,001112	83683613	26	0,000
2014	89473476	382	0,000427	91355006	19	0,000
2015	80982138	1316	0,001625	83885018	80	0,000
2016	83184657	2822	0,003392	85336179	499	0,001
2017	88714198	4816	0,005429	89389812	1564	0,002
2018	96184323	8694	0,009039	97430587	3219	0,003
2019	95858001	14944	0,01559	97031193	7311	0,008
2020	87786407	8234	0,00938	90435862	4239	0,005
2021	61370371	3443	0,00561	71744932	2868	0,004

Table 3 shows the total import of EU countries on TIFTN code №61 (Knitwear or knitted garments and accessories), exports of Uzbekistan to the EU on this type of product. Based on the results, the share of Uzbekistan in the EU market was determined under the code TIFTN №61. According to the determined share, the highest value is 0.0454%, the lowest value is 0.0004% and the average value is 0.007%. The highest value for the TIFTN code №61 is 0.007%, the lowest value is 0.0001% and the average value is 0.002%. Based on these circumstances, the following is included:

Pessimistic scenario - the development of exports of garments without any strategies, without the use of marketing tools (forecasted based on the minimum value of market share);

Optimistic scenario - exports of garments will develop on the basis of the desire to maintain market share in the current situation. Uses traditional marketing strategies and existing market-oriented strategies (forecasted based on the average value of market share);

Innovative scenario - a scenario option that involves the effective use of GSP + special preferences,

⁶ <https://www.trademap.org/> - based on official statistics



the use of effective innovative marketing technologies, the use of various methods of active advertising and sales promotion (forecasted based on the highest value of market share);

The forecast results for 3 scenarios are presented in Table 4. The results of the forecast show that the gap between the export opportunities under the code TIFTN-61 and TIFTN-62 is pessimistic and the scenario of Innovation is high.

Table 4
Exports of garments and forecast products⁷, thousand US dollars

Scenarios	2021 y.	2022 y.	2023 y.	2024 y.	2025 y.	2026 y.
TIFTN-61. Knitwear or knitted garments and accessories						
Pessimistic	3443	271,5	281,0	290,5	300,0	309,5
Optimistic		5022,8	5198,5	5374,3	5550,1	5725,9
Innovative		28895,6	29906,8	30918,0	31929,3	32940,5
TIFTN -62. Knitwear and non-knitted garments and accessories) Forecast for exports						
Pessimistic	2868	73,5	75,2	77,0	78,8	80,5
Optimistic		1493,4	1529,0	1564,6	1600,2	1635,8
Innovative		5537,8	5669,9	5801,9	5933,9	6066,0

It is known that the Decree of the President of the Republic of Uzbekistan dated January 28, 2022 "On the development strategy of the new Uzbekistan for 2022-2026" No. PF-60 to develop and implement a program to increase production and exports of textile products in 2022-2026, The strategic goal is to double the volume of textile production.⁸ In particular, it is planned to increase the volume of exports of finished products of national and foreign brands to 5 billion US dollars in 2026, increase the number of jobs in the industry to 570 thousand people, increase the volume of artificial fiber processing to 200 thousand tons.⁹ In order to achieve these goals, it is necessary to focus on strategies developed on the basis of in-depth marketing research in the textile market, especially in the European market.

The results of the above analysis show that Uzbekistan has a relative advantage in the European market in terms of high competition for certain types of textile products. If textile enterprises use innovative marketing strategies for European markets, the forecast results suggest that there are opportunities to increase export opportunities not by several times, but by several 10 times.

In addition to the above, Uzbekistan should pay special attention to a number of issues related to increasing export opportunities to the European Union. In particular, the development of e-commerce will expand the opportunities to study the markets of European countries, the Government should focus on

diversifying the export base, exploring new markets and promoting e-commerce with the European Union.

Export sectors need to be radically reformed. They should encourage the use of modern technologies, new research and innovation, production methods, pay special attention to training and retraining. The effective organization of the integration of small business and private entrepreneurship and large enterprises, the proliferation of clusters and technoparks should encourage small businesses to be part of the value chain.

CONCLUSIONS

In order to ensure competitiveness in the international market, attention should be paid to the formation of the infrastructure of export-oriented textile industries. Today, the main focus of the formed clusters is still to create value based on the production of a complete cycle of the product. It ignores the value created by marketing tools.

One of the important issues in creating value on the basis of marketing tools should be the packaging and transportation of products in accordance with international standards.

The top exporters to the EU are China, Bangladesh and India. To compete with them, Uzbekistan needs to develop programs to provide subsidies and incentives to exporting companies to encourage technological innovation and remove barriers.

⁷ Predictive results obtained by the author

⁸ Decree of the President of the Republic of Uzbekistan No. PF-60 of January 28, 2022 "On the development strategy of the new Uzbekistan for 2022-2026"

⁹ Decree of the President of the Republic of Uzbekistan No. PF-60 of January 28, 2022 "On the development strategy of the new Uzbekistan for 2022-2026"



It is desirable for Uzbek companies to establish strong ties with international distribution companies that will help them enter European markets. It should also implement a wide range of government-level activities that facilitate trade fairs and interaction between buyers and sellers. This helps in identifying the specific needs of customers and placing orders according to their specifications, as well as in production planning.

It is necessary to effectively use marketing tools that help to enhance the image of Uzbekistan in European countries. Taking into account the interest of European countries in culture, science and art, the implementation of various events celebrating the cultural and spiritual heritage of Uzbekistan will help to shape the image of the country in the minds of Europeans.

In the textile industry, it is advisable to encourage gender principles in order to encourage women's participation in the labor market. Uzbekistan has the highest number of women employed in the textile industry, compared to other countries, including India, Bangladesh and Pakistan. This is another opportunity to gain a competitive advantage.

In conclusion, it is expedient to form a working group at the governmental level to develop and implement a strategic "road map" for the effective use of the system of GSP + special preferences in Uzbekistan.

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