



京津冀开发区智库丛书

The Jing-Jin-Ji Development Zone Think Tank Series

丛书主编 池宇

Chief Editor Chi Yu

京津冀 开发区产业 协同发展研究

Research on the Industry Synergetic
Development of Beijing-Tianjin-Hebei
Development Zones

马立平 / 池 宇 / 刘 强 / 任 韬 / 阮 敬 著



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总 序

General Introduction

位于华北平原的北京市、天津市、河北省，即京津冀地区，同属京畿重地，东濒渤海，西靠太行，自古以来地缘相接、人缘相亲、渊源久远、一脉相承。新中国成立以后，特别是改革开放以来，京津冀地区社会经济快速发展，以约占2.3%的国土面积，实现了约占全国10%的经济总量，成为中国北方经济规模最大、最具活力的地区，成为中国政治、文化、国家交往、科技创新、经济发展核心和辐射带动区。

2014年2月26日，习近平总书记在北京考察工作时指出：实现京津冀协同发展，是面向未来打造新的首都经济圈、推进区域发展体制机制创新的需要，是探索完善城市群布局和形态、为优化开发区域发展提供示范和样板的需要，是探索生态文明建设有效途径、促进人口经济资源环境相协调的需要，是实现京津冀优势互补、促进环渤海经济区发展、带动北方腹地发展的需要，是一个重大国家战略，要坚持优势互补、互利共赢、扎实推进，加快走出一条科学持续的协同发展路子来。

2015年4月30日，中共中央政治局会议审议通过《京津冀协同发展规划纲要》，明确了京津冀协同发展的战略意义、总体要求、定位布局和相关任务，描绘了京津冀协同发展的宏伟蓝图，为形成京津冀协同发展强大合力提出了行动指南。

国家级开发区作为体制改革的试验田、对外开放的窗口、经济发展的引擎，30多年来，为国民经济的发展做出了突出贡献。目前，国家级开发区（包括219个国家级经济技术开发区、145个国家级高新区）的GDP总量约占全国的25%，已成为科技创新、产业转型升级、企业提质增效、对外交流开放乃至国民经济整体发展的主力军、主战场和动力源。

在推动京津冀协同发展的历史潮流中，国家级开发区自觉地承担起应有的历史使命。2015年7月16日，京津冀13个国家级经济技术开发区与中国开发区协会、京津冀三地开发区协会等，在北京共同发起成立了“京津冀开发区创新发展联盟”。2016年4月1日，国务院办公厅印发了《关于完善国家级经济技术开发区考核制度促进创新驱动发展的指导意见》（国办发〔2016〕14号），文件中明确提出：“鼓励国家级经开区按照国家区域和产业发展战略共建跨区域合作园区和合作联盟。依托京津冀开发区创新发展联盟，促进常态化的产业合作、项目对接和企业服务，提升区域合作水平。”

新中国成立特别是改革开放以来，中国产业特别是制造业得到了跨越式的发展。2010年，中国超越美国成为全球制造业产出最高的国家。目前，中国制造业占全球制造业的比重已超过20%。在国际标准工业分类中，中国制造业在7个大类中占世界比重名列第一，钢铁、水泥、汽车等220多种工业品产量居世界第一位。

中国产业在快速发展中也显现出一些突出问题。与世界先进水平相比，中国制造业大而不强，在自主创新、资源利用、产业结构、质量效益、工匠精神和品牌建设等方面差距明显，转型升级和跨越发展任重道远。开发区作为产业发展的排头兵，在产业革命的机遇和挑战面前理应继续走在前面。

京津冀开发区产业协同发展和转型升级的关键在于创新，在于对国家重大战略的研究、落实，在于经济社会资源的整合、共享，在于发展和服务模式的探索、尝试。

“京津冀开发区智库丛书”将以京津冀开发区产业发展为核心，“立足区域、服务全国、辐射全球”，聚焦国家战略、反映历史进程、剖析实际问题、研究发展规律、探索创新路径。智库丛书内容涉及综合发展、产业经济、区域经济、投资促进、企业转型、技术创新、质量品牌、人力资源、投融资和政策法规等多要素、多角度、多领域。

“京津冀开发区智库丛书”编写工作将以“京津冀开发区创新发展联盟”和首都经济贸易大学合作组建的“产业发展研究中心”为主要工作团队，坚持“政产学研用”协同创新原则，汇聚各方力量，互学互鉴，充分交流，共同探索创新发展新路径、共同培育创新发展新引擎。

京津冀开发区智库丛书编委会

2017年3月19日

General Introduction

Beijing City, Tianjin City and Hebei Province, known as the Jing-Jin-Ji region, located on the North China Plain, are the capital city and its environs. The east of the region is near Bohai and the west of it is near the Taihang Mountains. Since ancient times, they share the geographical borders, population's interactions, the same history, and the same culture. Since the founding of The People's Republic of China, especially since China's reform and opening to the outside world, the social economy in Jing-Jin-Ji region has been enjoying rapid development. The limited 2.3% land area has yielded about 10% of the country's total economic output. Commonly regarded as the core area of politics, culture, international interaction, science and technology innovation, it has been the largest and most dynamic region in North China's economy, and it is also the core radiation area of national economic development.

On February 26, 2014, General Secretary Xi Jinping pointed out during his inspection work in Beijing: Achieving the coordinated development of Jing-Jin-Ji region is to build a new capital economic circle for the future, to push forward the innovation system and mechanism of regional development, to explore and perfect the layout and shape of the urban agglomeration and to provide an example and

model for optimizing the development of the regional development; to explore and improve the layout and form of city group, to explore the ecological civilization construction, to promote the coordination of population, economy, resources and environment; to realize the complementary advantages of Jing-Jin-Ji region, to promote the development of the Bohai economic zone and to drive the development of the northern hinterland. It is a major national strategy to adhere to the principle of complementary advantages and solid progress, to speed up a scientific and sustained way of coordinated development.

In April 30, 2015, *The Jing-Jin-Ji Collaborative Development Plan* was approved by the Political Bureau of the Central Committee Meeting, clarifying the strategic significance of the coordinated development of Jing-Jin-Ji region, the general requirements, the location layout and the related tasks. It also described the grand blueprint of Jing-Jin-Ji coordinated development, putting forward guidelines for the formation of powerful force for the coordinated development of this region.

As the experimental field of the system reform, the window of opening to the outside world and the engine of economic development, the state-level development zones have made outstanding contributions to the development of the national economy over the past 30 years. At present, the National Development Zones (including 219 state-level Economic and Technological Development Zones, 145 national high-tech zones) produce 25% of China's GDP. These zones have been the main force, the main battlefield and the power source of the scientific and technological innovation, the industrial transformation, the updating of enterprise quality and efficiency, the foreign exchanges and opening up, and even the overall development of the national economy.

In the historical trend of promoting the coordinated development of Beijing, the Jing-Jin-Ji region, the state-level development zones have consciously undertaken their historical mission. In July 16, 2015, 13 state-level Economic and Technological Development Zones in the Jing-Jin-Ji region, working together with China Development Zone Association and the Jing-Jin-Ji Development Zone Association, established The Innovation and Development League of the Jing-Jin-Ji Development Zone. On April 1, 2016, the document of *On Improving the Assessment System of National Economic and Technological Development Zone*

Guidance to Promote the Development of Innovation was issued by the State Council (issued [2016] 14 document). It clearly pointed out that “the national economic development zones are encouraged to build cross regional cooperation parks and cooperation alliances in accordance with national, regional and industrial development strategies, that the Jing-Jin-Ji Development and Innovation League will play an active part in promoting the normalization of industrial cooperation, project docking and enterprise services, to enhance regional cooperation level.”

Since the founding of the People's Republic of China, especially since the reform and opening to the outside world, China's industry, in particular the manufacturing sector, has made a tremendous development. In 2010, China overtook the United States as the world's largest producer of manufactured goods. At present, China's manufacturing sector has accounted for more than 20% of the total amount of the whole world. In the international standard industrial classification, the proportion of China's manufacturing industry in the world ranks first among the 7 major categories, and more than 220 kinds of industrial products, such as steel, cement and automobiles, rank first in the world.

The rapid development of the industry has also highlighted some problems. Compared with the internationally advanced level, Chinese manufacturing industry is large in scale but not competitive. There exists an obvious gap between China and the developed countries in independent innovation, resource utilization, industrial structure, quality, efficiency, the artisan spirit and brand building. Transformation, upgrading and leapfrog development have a long way to go. As the vanguard of industrial development, the development zone should continue to move ahead in the face of opportunities and challenges of the industrial revolution.

There are several keys to the transformation and upgrading of the coordinated development of Jing-Jin-Ji Industrial Development Zone, including the innovation, the research and the implementation of major national strategy, the integration of economy and society, the resources sharing, the exploration and experiments of the development and service mode.

The Jing-Jin-Ji Development Zone Think Tank Series focuses on the industrial development of the Jing-Jin-Ji Development Zone, adhering to the principle of maintaining the foothold area, interacting comprehensively, radiating globally,

focusing on the national strategy and reflecting the historical process. The series will analyze the practical problems, study the nature of development models and explore the innovative methods. *The Think Tank Series* covers multiple factors, multiple angles and multiple domains, including the comprehensive development, industrial economy, regional economy, investment promotion, enterprise restructuring, technological innovation, brand quality, human resources, investment and financing investment, policies and regulations.

The major working team involved in the compilation of *The Jing-Jin-Ji Development Zone Think Tank Series* is the Industrial Development Research Center, founded by the Tianjin Development Zone Innovation Development Alliance and Capital University of Economics and Business. We will adhere to the principle of collaborative innovation of politic, industry, teaching and research, to converge forces from all aspects, to strengthen mutual exchanging and learning from each other, to have full and Complete exchange, to explore the new path of the innovation and development, and to foster new types of engines of innovation and development.

The Editorial Board of the Jing-Jin-Ji Development Zones Think Tank Series

March 19, 2017

前 言

Preface

京津冀协同发展是新时代优化国家区域发展战略格局，打造新的经济增长极的重大命题。自2014年初习近平总书记正式提出以来，京津冀协同发展战略引起了社会各界的高度关注。2015年4月30日，中共中央政治局审议通过《京津冀协同发展规划纲要》，标志着“京津冀协同发展”正式上升为国家战略。之后，一系列京津冀协同发展的战略举措陆续推出，京津冀区域在交通、生态、产业、公共服务四大领域的协同发展等均有了重大突破，取得了显著成效。

在京津冀协同发展的四大战略重点中，应该说交通、生态、公共服务的协同由于目标单一、政府主导作用突出，实现相对容易，而产业的协同发展由于其具有多目标、多主体的特征，成为京津冀协同发展的关键与难点。

从国际层面看，世界经济的重心已经向亚太地区转移，特别是2008年全球金融危机爆发以来，欧美经济持续低迷，世界经济尤其是制造业发展重心逐渐转入亚太尤其是东北亚地区。为了改变这种态势，欧美等西方国家近年来出台了一系列重大举措，纷纷实施了“再工业化”战略，重塑制造业竞争新优势，例如美国的“再工业化”，德国的“工业4.0”，法国的“新工业法国计划”等，2018年以来，发生的各种贸易争端更是这种矛盾的突出表现。

从国内层面看,近年来,中国经济开始出现明显的变化。这些变化包括经济增长更趋平稳和经济结构不断优化,中国经济进入“新常态”。在“新常态”下,经济增长将会放缓,通胀压力将会上升,收入分配更为平等,经济结构更为均衡,产业结构升级将会加快。可以说,这种新的增长模式更具可持续性,但也面临着诸多挑战。

经济发展的新动力在哪里?习近平总书记提出了“供给侧结构性改革”的总体思路,其中产业结构转型、产业协同发展成为政策发力的重要抓手。产业协同发展是京津冀协同发展的内在要求,探索京津冀区域产业协同发展的长效机制,规划区域产业协同发展的系统架构,建立区域协调发展的现代产业体系是京津冀产业协同发展的根本要求。准确了解、把握京津冀产业协同发展的推进效果,对于及时、科学、有效地进行战略措施的动态优化与调整十分关键。

在全面推进京津冀协同发展的过程中,京津冀国家级开发区作为产业集聚和经济发展的主战场、改革开放的排头兵,扮演着举足轻重的角色。国家级开发区不仅是地区重要的经济增长点,为区域经济的持续发展做出了突出贡献,而且在中国由“制造大国”向“创造大国”“经济强国”转型过程中也担负着科技引领、产业支撑、经济引擎的重要使命,成为吸引外资、承接国际产业转移和开展对外贸易的重要平台。

京津冀开发区产业协同发展的研究,一方面可以揭示当前京津冀各经济技术开发区主导产业的发展现状和发展优势,为今后产业园区的招商引资提供现实依据;另一方面也可以显示京津冀国家级经济技术开发区之间产业发展状况的差异,为区域产业结构优化升级和产业布局调整提供信息资料,为各开发区建立互惠共赢的合作机制提供重要依据。因此,从全局视角研究京津冀国家级开发区产业协同发展现状,对于准确了解和把控京津冀各国家级开发区的产业发展状况,以及各开发区之间的协同合作具有重要意义,并对开发区打造良好的营商环境、制定合理的产业发展政策有重要的指导价值。

本书以京津冀13家国家级经济技术开发区(简称经开区)为研究对象,对经开区产业协同发展问题开展系统研究,从经开区主导产业分布、产业发展差异、创新发展三个视角对京津冀经开区产业协同发展效果进行了定量分析,为京津冀协同发展战略的动态优化提供理论和数据支撑,为北京“四个中心”建设、为国家及区域经济协同发展提供高质量的智库服务和决策支持。

感谢京津冀开发区创新联盟对本书编写工作的指导、帮助，也特别感谢北京经济技术开发区管委会企业发展服务局蔡腾飞、崔新宏等同志的参考与大力支持。

在本书的写作过程中，首都经济贸易大学的张沛祺、冯亮、鲍鑫、何峰、王帅、朱慧艳、柏元元、宋雨晴、许妍青、纪明芳、张冉等博士生、硕士生做了大量工作，主要负责数据分析和可视化展示；首都经济贸易大学出版社的杨玲社长和薛捷老师为本书的出版付出了很大努力；在此一并表示感谢。

特别声明，由于获取手段和获取时间的限制，书中涉及的相关数据仅供参考，一切以各经济技术开发区发布的最新数据为准。

由于时间和能力水平有限，不妥之处在所难免，恳请业界同仁不吝赐教。我们的电子信箱为：maliping93@126.com.

作者

2018年8月

Preface

The coordinated development of the Beijing-Tianjin-Hebei area is a key issue of the national strategy of optimizing regional development layout, and creating new economic growth pole in the new era. Since officially proposed by General Secretary Xi Jinping in 2014, the coordinated regional development of Beijing-Tianjin-Hebei is receiving increasing attention from all sectors of society. *The Outline for the Coordinated Development of the Beijing-Tianjin-Hebei Area* was approved by the Political Bureau of the Communist Party of China on April 30, 2015, which manifests the integrated development of Beijing-Tianjin-Hebei has become officially the national strategy. A series of strategic initiatives were brought out afterwards. Breakthroughs and remarkable results have been made in the coordinated development of traffic management, environmental protection, industrial upgrades and public service.

Among the four strategic focus areas of the Beijing-Tianjin-Hebei coordinated development, the coordination of traffic management, environment protection and public service are comparatively easy to achieve, as their targets are unitary and the government is playing a leading role. The coordinated development of industrial upgrades is

the key and even the difficult issue of the Beijing-Tianjin-Hebei coordinated development, because it has multiple targets and stakeholders.

From the international aspect, the world economic hub is shifting to Asia-Pacific region, especially when the economic downturn of Europe and America has transferred the world economy represented by manufacturing industry to Asia Pacific area, north-east Asia more specifically, since the Asia financial crisis in 2008. In order to reverse this trend, the western countries has taken a series of great actions to rebuild the competitive advantage of their manufacturing industry, like the re-industrialization strategy, represented by the “re-industrialization” of the US, the “Industry 4.0” of Germany and the “New Industrial France” of France.

From the domestic aspect, China's economy has shown major changes in recent years. The changes include the steadier economic growth and the continuous optimization of the economic structure. Chinese economy has entered the “new normal” period. In the “new normal” period, the economic growth will slow down to a right speed, the inflation pressure will rise, the income distribution will become more equal, the economic structure will be more balanced, and the industrial structure upgrades will accelerate. The new growth model will be more Sustainable, while be faced with challenges as well.

Regarding the new driver of the economic development, General Secretary Xi Jinping has raised the thoughts of the “supply-side structural reform”. The industrial structure transition and industrial synergy become the keys of the policy implementation. The industrial synergy is an integral part of the Beijing-Tianjin-Hebei coordinated development, and it is the fundamental demand of the industrial synergy to explore a long-term mechanism and plan a system structure of the regional industrial synergy, and to build a regional coordinated modern industrial system. To know accurately the implementation progress and results of the Beijing-Tianjin-Hebei industrial synergy is the key to optimize and adjust the strategic measures dynamically in a timely, scientific and effective way.

In the comprehensive promotion of the Beijing-Tianjin-Hebei coordinated development, as the main battlefield of the industrial cluster and economic development, and bellwether of economic reform and opening-up, the national-level development areas of Beijing, Tianjin and Hebei are playing a prominent role.

National-level development areas are not only the main regional economic growth points, making important contribution to the continuous development of the regional economy, but also undertake the mission of leading technology innovation, industrial support and economic engine, and become important platforms to attract overseas investment, take over international industrial transfer and develop foreign trade, when China transfers from manufacturing power to innovation power and economic power,

The research on the industrial synergetic development of Beijing-Tianjin-Hebei development zones, on the one hand, can demonstrate the development status and advantage of each economic development zone of Beijing, Tianjin and Hebei, and provide the realistic basis for the attraction of investment; on the other hand, can present the difference of the industrial development status between all national-level economic development areas in Beijing, Tianjin and Hebei, to provide information and materials for the regional industrial structure optimization and industrial distribution, and important evidence to build a mutually beneficial cooperative mechanism for all development areas. Therefore, the study, from a global view on the industrial synergy of the Beijing, Tianjin and Hebei national-level development areas is of great significance for the accurate understanding and control of the overall industrial development status and the synergic relationship of all national-level development areas in Beijing, Tianjin and Hebei, and has important indication on building a favorable business environment for the development area and establishing the appropriate industrial development policies.

This book takes the 13 national-level economic and technological development zones (ETDZ) for research, and makes a systematic study on the industrial synergetic development of the ETDZ. It makes a quantitative analysis on the Beijing-Tianjin-Hebei ETDZ industrial synergetic development effect from the aspects of leading industry distribution, industrial development difference and innovative development. It provides theoretical and data support for the dynamic optimization of the Beijing-Tianjin-Hebei coordinated development strategy, and provide high quality think tank service and decision support for the Beijing “four centers” construction and the national and regional economic coordinated development.