



中国社会科学院创新工程学术出版项目



北京市哲学社会科学规划办公室资助出版



京津冀蓝皮书

BLUE BOOK OF BEIJING-TIANJIN-HEBEI

京津冀发展报告

(2017)

协同发展的新形势与新进展

祝合良 叶堂林 张贵祥 等 / 著

ANNUAL REPORT ON



BEI METROPOLITAN

REGION DEVELOPMENT REPORT (2017)



社会科学文献出版社
SOCIAL SCIENCES ACADEMIC PRESS (CHINA)

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图书在版编目(CIP)数据

京津冀发展报告. 2017: 协同发展的新形势与新进展 / 祝合良等著. -- 北京: 社会科学文献出版社, 2017.6

(京津冀蓝皮书)

ISBN 978-7-5201-0964-2

I. ①京… II. ①祝… III. ①区域经济发展-研究报告-华北地区-2017 IV. ①F127.2

中国版本图书馆 CIP 数据核字 (2017) 第 132751 号

京津冀蓝皮书

京津冀发展报告 (2017)

——协同发展的新形势与新进展

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出 版 人 / 谢寿光

项目统筹 / 恽 薇 高 雁

责任编辑 / 王玉山

出 版 / 社会科学文献出版社·经济与管理分社 (010) 59367226

地址: 北京市北三环中路甲 29 号院华龙大厦 邮编: 100029

网址: www.ssap.com.cn

发 行 / 市场营销中心 (010) 59367081 59367018

印 装 / 北京季蜂印刷有限公司

规 格 / 开 本: 787mm × 1092mm 1/16

印 张: 22.75 字 数: 344 千字

版 次 / 2017 年 6 月第 1 版 2017 年 6 月第 1 次印刷

书 号 / ISBN 978-7-5201-0964-2

定 价 / 89.00 元

皮书序列号 / PSN B-2012-262-1/1

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事京津冀协同发展、首都经济圈的研究与教学工作。主持、参与完成了国家级、省部级项目 10 余项，专著 7 部，发表核心期刊以上论文 40 多篇，撰写了多篇国家级内参和成果要报，有关研究成果多次获中央领导和北京市领导的重要批示。首都经济贸易大学优秀主讲教师，多次获首都经济贸易大学优秀教学效果奖。主持省部级课题有：北京社会科学基金面上项目“‘十二五’期间京津冀产业升级整合研究”（09BFJG269）、北京社会科学基金特别委托项目“北京城市功能疏解与首都圈城镇体系研究”（13JDCSD003）等。专著有：《京津冀都市圈理论与实践的新进展》（2009）、《“十二五”时期京津冀发展研究》（2010）、《世界贸易组织规则下我国农业保护政策研究》（2011）、《京津冀产业发展升级研究》（2011）、《京津冀发展报告（2014）——城市群空间优化与质量提升》（2014）、《北京建设世界城市与京津冀一体化发展》（2014）、《京津冀协同发展的基础与路径研究》（2015）等。

张贵祥（副主编）

理学博士，首都经济贸易大学城市经济与公共管理学院教授，区域经济学专业博士生导师，中国自然资源学会资源经济专业委员会副秘书长，中国区域科学协会理事，北京市属市管高校中青年骨干教师，教育部人文社科基金、中国科学院博士后科学基金项目评审专家。主要从事区域规划、生态城市规划、首都城市与京津冀都市圈、生态区位与水生态补偿等研究和教学工作。近几年主持了教育部人文社会科学基金、北京市自然科学基金、北京市哲学社会科学基金等省部级课题 5 项，主持北京市委组织部优秀人才资助项目、市教委人文社科项目、市社科联课题 3 项，主持大兴区城市化发展规划、朝阳区促进人口资源环境相协调问题研究、北京市取水许可与水资源有偿使用制度调研与评估课题 3 项。发表学术论文 60 余篇，2013 年专著《首都跨界水源地经济与生态协调发展模式与机理》荣获北京市第十二届哲学社会科学优秀成果二等奖。

摘 要

京津冀协同发展上升为国家战略已经三周年,2017年2月23日习近平总书记在北京考察并发表重要讲话,4月1日雄安新区正式设立,标志着京津冀协同发展和非首都功能疏解已经进入更高层次的发展阶段。京津冀协同发展在非首都功能疏解、交通一体化发展、生态环境保护、产业升级转移等方面取得了显著进展,但也存在着一些症结与障碍,如“一亩三分地”的思维定式尚未完全打破、协同发展的体制机制及非首都功能疏解的配套政策等仍需进一步完善。本书在全面梳理京津冀协同发展进展与成效的同时,通过构建数理模型、运用指数对京津冀协同发展的现状水平进行定量测度,试图找出协同发展过程中的短板,并提出相应的对策建议。

本书以研究“京津冀协同发展的新形势与新进展”为主题,构建了发展、协同、生态文明、人口发展和企业发展五大指数,并运用构建的指标体系对京津冀协同发展的进展进行测度与评价,由总报告、分报告、专题报告共12篇报告内容组成。总报告系统梳理了自京津冀协同发展上升为国家战略以来,在非首都功能疏解、交通一体化发展、生态环境保护、产业升级转移等方面取得的显著进展,得出基本判断和找出问题的症结所在,并提出相应的对策建议。在协同进展方面,当前京津冀协同发展规划蓝图已经绘就,协同发展迈入新阶段;非首都功能疏解有序推进,“大城市病”有所缓解;交通一体化建设成效显著,“1小时交通圈”正在形成;生态环境保护力度加大,联防联控机制日益完善;产业转移对接步伐加快,产业空间布局得到优化;创新平台建设稳步推进,创新协同效果显著;公共服务一体化成效显著,地区间差距逐步缩小;市场一体化进程全面提速,要素流动日益频繁。在基本判断方面,本书通过构建数理模型、运用指数对京津冀协同发展的现



状水平进行定量测度，得出的基本结论是：在综合发展指数方面，北京总体最强，天津支撑力增长迅猛，河北辐射力快速上升；在协同发展指数方面，总体协同程度呈上升趋势，生态环境和社会保障是短板；在生态文明指数方面，北京总体最高，天津生态保护水平上升最快，河北资源利用水平最高；在人口发展指数方面，三地人口发展指数有所上升，京津石三足鼎立态势已确立；在企业发展指数方面，北京企业整体实力最强，天津研发转化优势明显，河北商贸物流优势显著。分报告由综合发展指数研究、协同发展指数研究、生态文明指数研究、人口发展指数研究和企业发展指数研究五个专题报告组成，对京津冀协同发展新进展进行了测度与评价，包括总体水平、发展趋势、内部结构以及得分排名等。专题报告分别对京津冀三地进行综合发展指数研究，并针对重点领域进行了专项分析。

本书的主要建树：

第一，进行了京津冀综合发展指数研究，构建了以支撑力、驱动力、创新力、凝聚力和辐射力“五力”为基本框架、由5个二级指标和33个三级指标组成的测度指标体系，并分别通过规模指标与人均指标对京津冀经济社会发展总体水平及发展特征进行综合测度，得出以下几点结论：从总体发展水平看，北京核心地位稳固，津冀差距呈缩小趋势；从支撑力看，北京实力最强，天津增长迅猛；从驱动力看，北京领先，但增速下降，河北与京津差距较大；从创新力看，北京创新优势明显，津冀创新力有所提升；从凝聚力看，北京呈下降态势，天津平稳上升，河北明显不足；从辐射力看，北京最强，河北快速上升，天津有待提升。本研究提出的对策建议：坚持以创新驱动发展为主线，以非首都功能疏解带动三地转变经济发展方式；坚持以绿色协调发展为保障，助力建设京津冀世界级城市群；坚持以开放共享发展为目标，优化津冀综合发展环境。

第二，进行了协同发展指数研究，采用了定基指数方法，综合运用直接数据、间接数据和全口径大数据，从协同能力、协同行为、协同绩效三个方面，构建了3个二级指标和13个三级指标，对2005~2014年京津冀三地协同发展指数进行了分析，得出的结论是：京津冀协同发展程度总体呈上升趋势。

势，三地协同发展的基础不断稳固，企业对协同行动的贡献最大，但协同绩效需要进一步提升，并就此提出了相应的对策建议。

第三，进行了生态文明指数研究，通过构建评价指标体系，分析了2011~2015年京津冀三地生态文明建设的进展、特点和不足。研究得出的结论是：京津冀三地的生态文明水平在不断提高，呈现北京最高、天津次之、河北较低的总体格局。对北京市来说，其生态文明水平总体上升明显，但在资源利用和环境治理方面相对不足。对天津市来说，与北京基本保持同趋势上升，生态保护水平提升较快，资源利用水平下降明显。对河北省来说，其生态文明水平与京津两市之间的差距较大，经济增长质量和环境质量是河北生态文明水平的相对短板，但进步速度较快。

第四，进行了人口发展指数研究，构建了人口活力、人口结构、生命质量3个二级指标和11个三级指标运用层次分析法对京津冀“2+11”城市的人口发展指数进行测算。研究得出，北京、天津、石家庄三地人口发展能力处于领先地位，但京津冀人口发展内部不平衡趋势凸显；同时，人口活力与人口结构波动较大，生命质量格局较为稳定。人口年龄结构不断老化，北京市、天津市和河北省在人口增长、受教育水平、居民健康水平等诸多方面存在明显的差别。同时，从“内卷化”的人口流动模式、促进人口均衡发展、发挥区域中心城市的辐射作用、提升生态环境质量等角度提出了相关对策建议。

第五，进行了企业发展指数研究，采用企业大数据对京津冀三地的企业发展实力、活力和创新力进行测度，并进行行业及重点地区分析。得出基本结论：从企业综合实力来看，北京最强、天津其次、河北较差；从行业来看，京津冀地区发展基础较好的行业为批发和零售业、科学研究和技术服务业、租赁和商业服务业、制造业等；从地区创新水平来看，北京科学研究和技术服务业创新能力最强，天津科学研究和技术服务业、制造业等行业创新能力较强，河北批发和零售业、制造业、租赁和商业服务业等行业创新能力较强。在此基础上提出了三方面对策建议：一是北京应依托具有产业优势、技术优势和重大战略价值的前沿领域，打造科技创新中心和创新策源地；二



是天津应面向国际、借势北京、立足自身，打造全国先进制造业研发转化基地；三是河北应落实国家重大战略、承接非首都功能、发挥现有产业优势，实现跨越式发展。

第六，针对主要问题，提出相应对策。本书综合五大指数及对京津冀三地和重点领域的研究，认为京津冀目前存在的主要问题是协调共享体制尚未完全形成，导致区域协同缺乏持续动力；配套政策不完善，导致功能疏解区疏解动力不足；生态保护机制薄弱，导致环境问题缺乏长效管控；产业梯度落差较大，导致产业协同缺乏必要基础；行政主导因素过强，导致优质要素分布不均。为此，本书提出五点思路与对策：一是建立协同发展的制度框架体系和区域协调机制；二是尽快完善功能及产业疏解的跨区域配套政策；三是尽快完善多元化的生态补偿机制；四是打造中国参与国际竞争的世界级产业集群；五是重点加强公共服务领域的社会政策对接。

本书是京津冀三地作者通力合作的智慧结晶。作者是来自首都经济贸易大学、国务院发展研究中心、中国人民大学、河北经贸大学、天津行政学院等单位的专家学者。本书为北京市哲学社会科学基金项目“首都发展研究报告（2017）——京津冀协同发展的新形势与新进展”（项目编号：16JDYJB040）和北京市教委创新团队项目“京津冀产业协同发展研究”的阶段成果，获得北京市经济社会发展政策研究基地、首都经济贸易大学特大城市研究院都市圈研究中心资助。

Abstract

The policy of Beijing-Tianjin-Hebei collaborative development has become national strategy for three years. General Secretary of the Communist Party of China, Xi Jinping visited Beijing and delivered an important speech on 23rd February, 2017. When the Xiongan New Area was established officially on 1st April, Beijing-Tianjin-Hebei collaborative development and alleviating non-capital functions has entered higher development stage. Although Beijing-Tianjin-Hebei collaborative development has made significant progress in alleviating non-capital functions, the integration of transportation development, ecological environment protection, industrial upgrading and transfer, etc., there are also some problems and obstacles. For example, thinking set of administrative division has not broken completely. Also, the collaborative development mechanism and policies of alleviating non-capital functions will still need to be improved. Based on introduction of the progress and effect of Beijing-Tianjin-Hebei collaborative development comprehensively, it is trying to find out disadvantages in the progress of collaborative and put forward the corresponding countermeasures and suggestions through measuring the status quo of Beijing-Tianjin-Hebei collaborative development using the mathematical models and the indicator systems.

This book consists of general report, sub-reports, special topic reports, amounting 12 chapters of 3 parts as the theme of the new trends and progress of Beijing-Tianjin-Hebei collaborative development. It is established five indicator systems as development, coordination, ecology, civilization, population and enterprise. In the General report, it is exploring the significant progress in alleviating non-capital functions, traffic integration development, ecological protection and industrial upgrading and transfer since the policy of Beijing-Tianjin-Hebei collaborative development has become to national strategy. Then, it is concluded the basic judgment, find out the crucial problems and put forward the



corresponding countermeasures and suggestions. About the progress of collaborative development, the current blueprint of Beijing-Tianjin-Hebei collaborative development has been drawn up which means that the collaborative development has entered a new age. Specifically, non-capital function has been alleviated effectively which promote to relieve metropolitan disease. It is remarkable that “one-hour-commuter circle” is forming as traffic integration. The ecological environment protection has been intensified and Joint prevention and control mechanisms have been improved. The pace of industrial transfer and docking is accelerating and the layout of industrial space is optimized. The innovation platform has been steadily promoted and the innovation synergy has been remarkable. The integration of public services has been achieved and the gap between regions has narrowed gradually. The process of market integration has been accelerated and the factors flow has become more frequent. In terms of the basic judgement, some conclusions have been drawn up by measuring the status quo of the Beijing-Tianjin-Hebei collaborative development through establishing mathematical models and using the indicator systems. As the comprehensive development indicator system shows that, the total score of Beijing is highest, the supporting force of Tianjin is growing rapidly and the economical radiation of Hebei is rising quickly. As the collaborative development indicator system shows that, the overall synergy level is improving, whereas the ecological environment and social security are short boards. As the ecological development indicator system shows that, the total score of Beijing is highest, the level of ecological protection of Tianjin is improving most rapidly and the level of resources utilization is highest. As the population development indicator system shows Beijing, Tianjin and Shijiazhuang has kept in balance. As the enterprises development indicator system shows that, the enterprises strength of Beijing is strongest, the advantage of research transfer into produce in Tianjin is obvious and superiority of commerce logistics in Hebei is significant. Sub-reports consist of Development indicators research, Collaborative indicators research, Ecological civilization indicators research, Population development indicators research and Enterprises development indicators research. Based on clarified the research ideas, the principles of establishing indicators systems and calculation methodology respectively, Beijing-



Tianjin-Hebei collaborative development was analyzed with multiple perspectives using the calculation outcomes which included the overall level, development trends, the internal structure and the score rankings. Special topic reports focuses on comprehensive indicators research of Beijing-Tianjin-Hebei.

The main contributions and viewpoints are as follows:

1. Beijing-Tianjin-Hebei Development indicators systems have been researched to establish “Five forces”: the supporting force, the driving force, the innovative force, the social cohesion and the economical radiation as the framework. The indicators systems were composed of five composite indicators and thirty-three relative indicators. According to the analysis of Development indicators of the scale level and the per capita level, the following preliminary conclusions have been drawn. From the perspective of development level, the core status of Beijing is still stable, while the gap between Tianjin and Hebei has been shrunk. According to the supporting force indicators, the scores of Beijing is highest and growing fast in Tianjin. In term of the innovative force indicators, there are significant innovation advantages in Beijing. From the perspective of the driving force, Beijing is in the lead but the growth rate is declining, whereas the score of Hebei is far from Beijing and Tianjin. The innovation of Tianjin and Hebei has been improved. From the perspective of the social cohesion, the scores of Beijing have been declining, whereas the scores of Tianjin is rising steadily and present inadequate significantly in Hebei. Based on scores of the economical radiation, the highest scores have been kept in Beijing. The scores of Hebei are rising rapidly, while it is need to be promoted in Tianjin. The countermeasures of this research have been proposed as follows. It should adhere to the development of innovation-driven development as the mainline and transform the mode of economic development in Beijing, Tianjin and Hebei through alleviating non-capital functions. We will adhere to the concepts of “Green” and “coordination development” as a guarantee for the construction of a world-class city cluster in the Beijing-Tianjin-Hebei region. Also, it is necessary to adhere to the goal of “Opening up” and “Sharing” and optimize the integrated development environment for the region.

2. Based on the fixed base index, Beijing-Tianjin-Hebei Collaborative



Development indicators system was included three composite indicators and thirteen relative indicators from three items of collaborative ability, collaborative behavior and collaborative performance by direct, indirect and whole caliber big data. Through analyzing Beijing-Tianjin-Hebei Collaborative Development indicators of Beijing, Tianjin and Hebei from 2005 to 2015, it is concluded that the collaborative level keep in rising and the basis of collaborative development has been strengthening in Beijing-Tianjin-Hebei. Enterprises' contribution to the collaborative action is the largest, but it is necessary to further enhance the collaborative performance and puts forward the corresponding countermeasures and suggestions.

3. The Ecological Civilization indicators system has been established to analyze the progress, features and shortcomings of ecological civilization in Beijing, Tianjin and Hebei from 2011 to 2015. It is concluded that the level of the ecological civilization has been improved increasingly which resulted in overall patterns as the best in Beijing and the lowest in Hebei. For Beijing, the overall level of ecological civilization has risen, but it is relatively short of resource utilization and environmental management. For Tianjin, the trend of maintaining as same trend as Beijing has been rising, the level of ecological protection has increased rapidly and the utilization of resources has decreased significantly. For Hebei, the gap of the ecological civilization level between Beijing and Tianjin is still large. The quality of economic growth and environmental quality are the short boards of Hebei, but it is making a great progress.

4. The Population Development indicators system has been established including three composite indicators as population viability, population structure and life quality and eleven relative indicators as the population development capability indicators system. It was contributing to monitor population status and development trends in cities of Beijing, Tianjin and Hebei. It is concluded that it is keeping the leading position of the population development abilities in Beijing, Tianjin and Shijiazhuang, but the trends of internal imbalance of the population development is even more prominent. At the same time, the population vitality and the population structure fluctuate greatly, whereas the life quality degree is relatively stable. Accompanying by an ageing population structure, there are

significant differences in the population growth, education level and residents' health level, etc. in Beijing, Tianjin and Hebei. The countermeasures and suggestions have been put forward from the population flow model as involution, promoting the population development in balance, playing the role of radiation of regional central cities and improving the ecological environment quality.

5. Enterprise Development indicators system has been established including three composite indicators as enterprise strength, vitality and innovation. It is concluded that from the overall strength of the enterprise, Beijing is the strongest, Tianjin is second and Hebei is inferior. From the industry, the industries keeping better development basic in the Beijing-Tianjin-Hebei region are wholesale and retail trade, scientific research and technical services, leasing and business services, manufacturing, etc. From the regional innovation level, the innovation ability of science and technology service industry in Beijing is the strongest, scientific research and technical services in Tianjin is better and manufacturing industries, wholesale and retail, manufacturing, leasing and business services industries in Hebei keep a strong innovation ability. Countermeasures and suggestions hasbeen put forward from the three aspects. Firstly, Beijing should build scientific and technological innovation center and innovation center relying on the competitive industries, technology and major strategic frontier field of value. Secondly, Tianjin should build a national manufacturing and transformation base on advanced manufacturing and oriented towards the international community with advantages of Beijing. Thirdly, Hebei should implement the national key strategies, undertake non-capital functions, give full play to the existing industrial advantages and realize leap-forward development.

6. Aimed to the main problem, appropriate countermeasures have been proposed. Combing five indicators systems and Beijing-Tianjin-Hebei comprehensive indicators, the main existing problems in Beijing-Tianjin-Hebei are as follows. Firstly. collaborative and sharing mechanism has not yet fully formed resulted in lack of sustainable motivation of regional synergy. Secondly, the lack of supporting policies leads to insufficient capacity in the dissolving area. Thirdly, weak ecological protection mechanisms resulted in a lack of long-term control over environmental issues. Fourthly, the industrial gradient is so low that the industrial



cooperation lacks the necessary foundation. Lastly, the administrative dominance factors are too strong which leads to the uneven distribution of quality factors. Therefore, five countermeasures have been put forward in the general report. Firstly, it is important to establish the collaborative development systematic framework and regional synergy mechanism. Secondly, it is necessary to improve across regions policies of alleviating functions and industries as soon as possible. Thirdly, it should put emphasis on enhancing the diverse ecological compensation as soon as possible. Fourthly, it should build world-class international competitive industries cluster of China. Last but not least, it is crucial to strengthen the implementation of the social policies in public service field.

This book is the fruit of the wisdom of experts and scholars from Beijing, Tianjin and Hebei. The authors are experts and scholars who are mainly from Capital University of Economics and Business, Development Research Centre of the State Council, Renmin University of China, Hebei University of Economics and Business and Tianjin Administrative Institute. The book is the stage result for following projects: “Capital Development Report—The New Trends and Progress of Collaborative Development Indicators Research (Project No. 16JDYJB040)” as Project of the Social Science Foundation of Beijing and “Industrial Collaborative Development in Beijing-Tianjin-Hebei as Innovation Research Team Project of Beijing Municipal Education Commission. It is also funded by Beijing Economic and Social Development Policy Research Base and The Metropolitan Area Research Center affiliated with Academy of Metropolis Economic and Social Development of Capital University of Economics and Business.