B 甘肃蓝皮书®
BLUE BOOK OF GANSU

甘肃住房和城乡建设发展分析与预测(2019)

主　编 / 苏海明　王福生　何苑

ANALYSIS AND FORECAST ON HOUSING AND URBAN-RURAL CONSTRUCTION DEVELOPMENT OF GANSU (2019)

甘肃人民出版社

2019版

需要全本请访问 www.ertongbook.com

甘肃蓝皮书

BLUE BOOK OF GANSU

甘肃住房和城乡建设发展分析与预测（2019）

ANALYSIS AND FORECAST ON HOUSING AND URBAN -RURAL CONSTRUCTION DEVELOPMENT OF GANSU（2019）

主　编 / 苏海明　王福生　何苑

甘肃人民出版社

图书在版编目（CIP）数据

甘肃住房和城乡建设发展分析与预测 2019 / 苏海明，何苑，王福生主编. -- 兰州 : 甘肃人民出版社，2018.12
ISBN 978-7-226-05396-6

Ⅰ. ①甘… Ⅱ. ①苏… ②何… ③王…Ⅲ. ①住宅建设－经济分析－研究报告－甘肃－2019②城乡建设－经济分析－研究报告－甘肃－2019③住宅建设－经济预测－研究报告－甘肃－2019④城乡建设－经济预测－研究报告－甘肃－2019 Ⅳ. ①F299.274.2

中国版本图书馆CIP 数据核字(2018)第290453 号

责任编辑：贾 文

封面设计：王林强

甘肃住房和城乡建设发展分析与预测（2019）

苏海明 何苑 王福生 主编

甘肃人民出版社出版发行

（730030 兰州市读者大道568号）

甘肃北辰印务有限公司印刷

开本787毫米×1092毫米 1/16 印张21 插页1 字数251千

2018年12月第1版 2018年12月第1次印刷

印数:1~1000

ISBN 978-7-226-05396-6 定 价:68.00元

甘肃蓝皮书编辑委员会

主　　任　王福生　陈富荣

副 主 任　范　鹏　王成勇　梁和平　石培文　赵喜泉

马虎成　苏海明　张应华　陈　波　张安疆

罗凤存　王大睿　马建东

总 主 编　王福生　陈富荣

成　　员　朱智文　安文华　马廷旭　王俊莲　王　琦

董积生　高应恒　刘玉顺　周小鹃

甘肃蓝皮书编辑委员会办公室

主　　任　董积生

副 主 任　王彦翔

《甘肃住房和城乡建设发展分析与预测(2019)》

编 辑 委 员 会

主　　任　苏海明　王福生

副 主 任　马育功　梁文钊　马少相　刘　宁

李兰宏　张作光　火　宏　董积生

委　　员　杨福波　贺瑞雪　牛又驿　张天军

王光照　姜显明　邵　斌　田　园

贺建强　杨士彪　雷永勤　董积生

何　苑

主　　编　苏海明　王福生　何　苑

首席专家　何　苑

需要全本请访问 www.ertongbook.com

主要编撰者简介

王福生 男，山东省胶州市人，出生地吉林省桦甸市。现任甘肃省社会科学院院长、研究员。甘肃省宏观经济研究会名誉副会长、省哲学学会副会长等。1983年北京大学哲学系本科毕业，曾先后在甘肃省委讲师团、省政府体改办、省发展和改革委员会、省委党校等单位工作。主要研究领域是改革学和经济体制改革。撰写或主编了《丝绸之路经济带研究》等10余部专著与编著；发表过“推动丝绸之路经济带构建应立足西北省区”等50余篇文章；主持完成多项省软科学和社科规划重大项目，多次获“甘肃省科学技术进步奖二等奖”和甘肃省社会科学优秀成果奖。代表作是《大变法：中国改革的历史思考》，进入了清华大学、北京师范大学、南京大学、台湾国立政治大学、香港浸会大学等大学的图书馆书目。

何　苑 女，河南省灵宝县人，甘肃省社会科学院资源环境与城乡规划研究所所长，研究员、经济学博士。全国县镇经济研究会理事、省政府决策咨询委员会委员、兰州新区智库专家。主要从事区域经济、城镇化、房地产以及收入分配等方面的应用研究。主持和参与国家级、省部级等多项重大项目研究；主持完成甘肃省“十二五”、“十三五”多个省级重点规划及省市相关部门的委托项目40余项。在各类专业杂志发表论文60余篇，多次获得甘肃省社会科学优秀成果奖、甘肃省科技进步奖等奖项。

总　序

“甘肃蓝皮书”从2006年诞生之初的《甘肃经济社会发展分析与预测》《甘肃舆情分析与预测》，发展到如今的13部，成为全面反映甘肃经济社会文化建设的系列蓝皮书，走过了13年历程。其社会影响力愈益扩大，已由最初的甘肃省社会科学院科研平台，发展成为服务党委政府决策和全省经济社会发展的甘肃省内智库的重要品牌，甘肃社会科学界的学术品牌，甘肃文化领域的标志品牌，甘肃一些重要行业及市州工作的展示品牌。

“甘肃蓝皮书”的诞生与发展，既生动记录了甘肃省经济社会的巨大变迁和人民群众关注点的细微变化，又充分展现了传统社会科学研究机构向现代特色智库、高端智库、数字智库转型的发展历程。2006年，甘肃省社会科学院编研的《甘肃经济社会发展分析与预测》《甘肃舆情分析与预测》面世，标志着“甘肃蓝皮书”的正式诞生。至“十一五”末，《甘肃经济发展分析与预测》《甘肃社会发展分析与预测》《甘肃县域发展分析与预测》《甘肃文化发展报告》等陆续面世，“甘肃蓝皮书”由原来的两种增加到5种，覆盖了经济、政治、社会、县域、文化等研究领域。此后，我院首倡甘肃、陕西、宁夏、青海、新疆西北五省区社科院联合编研出版“西北蓝皮书”，2011年首部《中国西北发展报告》面

世。“西北蓝皮书”的编研和出版发行，使甘肃省社会科学院系列蓝皮书的研究拓展到了“丝绸之路经济带”的国内主要相关区域。

从2014年起，甘肃省社会科学院持续发挥“甘肃蓝皮书”品牌效应，加强与甘肃省重要部门和市州的合作。先后与省住房和城乡建设厅、省民族事务委员会、酒泉市政府、省商务厅、省统计局等积极合作，共同编研出版住建、民族、商务、酒泉等蓝皮书。2018年又与省精神文明办、平凉市合作，新增了《甘肃精神文明发展报告》《平凉经济社会发展报告》。2018年7月，省委常委、省委宣传部部长陈青来我院调研，要求我院编研出版《甘肃文化建设成果报告》蓝皮书，并在第三届丝绸之路（敦煌）国际文化博览会上发布。在圆满完成任务的同时，我院“甘肃蓝皮书”的编研规模也由此扩大到“5+7+1”，共计13本。

“甘肃蓝皮书”在13年的编研过程中形成了稳定规模、稳定机制，提升质量、提升影响的编研理念。2018年是改革开放40周年，“甘肃蓝皮书”在选题和框架设计上紧密结合甘肃省40年来发展成就，做到了紧跟时代反映当下。这也体现了“甘肃蓝皮书”始终坚持的基本编研理念和运行机制：一是始终坚持原创，注重学术观点和科研方法的创新。坚持研究在先、编写在后，在继承中创新，注重连续性；从源头上抓质量，注重可靠性；在深入研究上下功夫，注重科学性；在服务上抓效果，注重影响力。二是始终坚持追踪前沿，注重选题创新。追踪前沿就是让专家学者更多地参与社会实践，发现问题、研究问题、解决问题，最终通过蓝皮书为人们提供正确的指导，显示社科专家服务社会的能力和实力，

提高蓝皮书的知名度和美誉度。三是始终坚持打造品牌，创新编研体制机制。13年来，我们始终把蓝皮书的质量看作蓝皮书的生命线，组织有研究能力的专家开展深入研究，向社会提供事实根据充分、分析深入准确、结论科学可靠、对策具体可行的研究成果。

展望未来，作为地方社会科学研究机构，将按照十九大关于“加强中国特色新型智库建设”的要求，进一步围绕甘肃经济社会发展的实际，开展应用对策研究，发挥好决策咨询、资政建言、服务地方的作用。“甘肃蓝皮书”作为我院打造陇原特色新型智库的核心载体，也将开启服务省委、省政府决策，为甘肃改革发展提供智力支撑的新航程。相信在各方共同努力下，“甘肃蓝皮书”将继续提升品牌影响力，成为服务党委、政府决策的更有作用的参考书，成为让社会各方面更有参考价值的应用成果。

此为序。

王福生

2018 年 12 月 6 日

摘　要

本书是由甘肃省社会科学院和甘肃省住房与城乡建设厅合作完成的。本书秉承客观公正的宗旨和原则，追踪甘肃房地产市场和城乡建设的最新动态，对全省房地产和城乡建设的发展现状与趋势进行深度分析，剖析因果，展望未来，谋划应对策略。全书分为房地产和城乡建设两部分，由两个总报告和12个分报告组成。总报告对全省房地产市场和城乡建设的发展态势进行全面和综合的分析，分报告则基于相关调研基础上对全省房地产市场、城镇化及城乡建设等方面的热点问题进行个案分析或深度诠释。

房地产方面，自2017年以来，房地产调控继续保持高压严查的态势，坚持“房住不炒”政策定位，兰州等城市调控在进一步升级。全省房地产市场继续保持了较快增长态势，2018年1—8月，在全省固定资产投资同比下降8.9%的情况下，我省房地产投资依然取得11.3%的增速，房地产开发不仅拉动全省固定资产投资的增长，也是全省稳增长的主要动力。但值得注意的是，全省商品房销售面积在2016年达到峰值后，2017年下降到1560万平方米，同比下降7.1%，首次出现20多年来的负增长，商品房销售额增长明显放缓。

展望2019年，房地产政策将坚持政策的连续性稳定性，短期调控不会放松，稳预期成为未来房地产调控的主要内容。在现有调控政策下，全省住房开发仍维持增长态势，但成交量和成交金额会有所下降。全省住房市场总体有所回落，但热点城市兰州、

天水住房价格仍会有所上涨。

城乡建设方面，围绕全面建成小康社会和建设幸福美好新甘肃的宏伟目标，全省加快推进城乡基础设施、特色小镇和田园综合体建设等工作，城乡公共服务显著提升，城市基础设施建设不断加快，人居环境进一步改善，城乡一体化进程明显加快。

一是全省乡村振兴和新型城镇化战略加速推进，农村基础设施明显改善。结合精准扶贫，着力解决困难群众的住房安全问题。2018年1—8月，全省农村危房改造已开工7.72万户，开工率97.68%。加大对农村水电路网建设力度，全省所有乡镇和建制村通沥青或水泥路，农村自来水普及率达到87%，基本解决了农村居民饮水安全问题。行政村动力电也实现了全覆盖。2017年，全省完成城镇基础设施建设投资312.51亿元，城镇综合服务功能有效提升，城镇基础设施建设呈现出健康协调和高质量发展态势。二是全省污水处理厂运营达标和生活垃圾无害化处理设施建设方面取得突破性进展。2017年，全省城市污水处理率已达到93.25%，县城达到85.36%。全省城市、县城共建成生活垃圾无害化处理厂90座，城市垃圾无害化处理率达到91%。在住建部2017年前三季度全国城镇污水处理设施建设运行通报中，甘肃省排名由第20名跃升至第6名，西北片区第1名。三是全省城镇园林绿化工作取得重大突破。截至2018年上半年，甘肃省城市建成区绿化覆盖率达36%。兰州市获得了国家园林城市称号。关山莲花台风景名胜区被列入第九批国家级风景名胜区名单。四是推进全省全域无垃圾专项治理行动，城乡环境明显改善。全域无垃圾专项治理行动实施一年多来，截至2018年6月底，全省新建（在建）正规垃圾中转站及处理设施115座，全省定位排查了农村非正规垃圾堆放点14706个。通过全域无垃圾专项治理行动的开展，城乡环境卫生逐

需要全本请访问 www.ertongbook.com

渐改善，群众参与意识、环境卫生保护意识明显增强。

我省城乡建设仍存在诸多不足，尤其是基础设施和公共服务的城乡差距仍然较大。未来应以美丽乡村建设带动城乡基础设施和公共服务一体化补齐乡村建设的短板； 不断提升城乡垃圾污水处理能力建设，以全域无垃圾治理行动提升城乡环境；提高城镇公共基础设施管理能力，以精细化管理提升城镇宜居品质。

Abstract

The book was completed by the Gansu Academy of Social Sciences and the Department of Urban-Rural Housing Construction in Gansu Province. Adhering to the principle of objective, this book is tracking the latest dynamic of housing market and urban and rural construction in Gansu. In addition, this book tries to develop strategies by deep analysis of the current situation, causation and trends of the real estate and urban-rural construction in Gansu. The context is divided into two parts: Real Estate and Urban-Rural Construction, which consists of two general reports and 12 sub reports. The general reports analyzed the trend of the real estate market and urban-rural construction in Gansu comprehensively, and the sub reports made case analysis or in-depth interpretation of the hot issues of the real estate market, urbanization and urban and rural construction in the whole province based on relevant research.

Since 2017, the real estate regulation and control has maintained a high-pressure and strict inspection situation, adhered to the policy of 'housing, no speculation', and urban regulation and control in Lanzhou and other cities are further upgraded. The real estate market of the whole province has maintained a relatively rapid growth trend. From January to August 2018, the real estate investment of the whole province still achieved a growth rate of 11.3%, even though the fixed asset investment of the whole province decreased by 8.9% on year-on-year basis. Real

estate development not only stimulates the growth of the fixed assets investment of the whole province, but also serves as the main driving force for the steady growth of the whole province. However, it is noteworthy that after reaching its peak in 2016, the sales area of commercial housing in the province dropped to 15.6 million square meters in 2017, down 7.1% from the same period last year, which was the first time showed the negative growth for the past 20 years. And the sales growth of commercial housing has slowed down significantly.

Looking forward to 2019, the real estate policy will adhere to the continuity and stability of the policy, short-term regulation will not be relaxed, and stable expectations will become the main content of future real estate regulation. Under the current existing regulatory policies, the housing development in the province still maintains a growth trend, but the volume and amount of transactions will decline. Overall, the housing market in the province has fallen, but the housing prices in the hot cities of Lanzhou and Tianshui will still rise.

Around the grand goal of building a well-off society in an all-round way and building a happy and beautiful new Gansu, the province has accelerated the construction of urban and rural infrastructure, characteristic towns and pastoral complexes. The public services in urban and rural areas of the province have been significantly improved, the construction of urban infrastructure has been accelerated, the human settlements environment has been further improved, and the process of urban-rural integration has been significantly accelerated.

First, the strategy of Rural Revitalization and new urbanization in the whole province has been accelerated, and rural infrastructure has been significantly improved. Combining with precise poverty alleviation,

efforts should be made to solve the housing security problems of the people in need. From January to August 2018, the reconstruction of dangerous houses in rural areas of the province has started to work on 72,200 households, with a starting rate of 97.68%. The construction of rural hydropower network has been intensified. All townships and villages in the province are equipped with asphalt or cement roads. Rural tap water penetration rate reached 87%, rural residents drinking water safety issues were effectively solved. The power and electricity of administrative villages are fully covered. In 2017, 31.251 billion yuan was invested in the construction of urban infrastructure in the whole province. The comprehensive service function of cities and towns was effectively improved. Urban infrastructure construction showed a healthy coordination and high-quality development trend. Second, breakthroughs have been made in the operation of sewage treatment plants and the construction of sanitary garbage treatment facilities in the whole province. In 2017, the municipal sewage treatment rate of the province has reached 93.25%, and that of the county has reached 85.36%. A total of 90 municipal solid waste treatment plants have been built in cities and counties of the province, and the harmless treatment rate of municipal solid waste reaches 91%. In the first three quarters of 2017, the Ministry of Housing and Construction notified the construction and operation of urban sewage treatment facilities in China, our province ranked from 20 to 6, and the northwest area ranked first. Third, major breakthroughs have been made in urban landscape greening in the whole province. As of the first half of 2018, the green coverage rate of urban built-up areas in the province reached 36%. Lanzhou has won the title of National Garden City. Guanshan Lianhuatai Scenic Area has been listed in the ninth batch of national scenic

spots. Fourth, we should promote the provincial-wide special waste-free management action to improve the urban and rural environment significantly. Over the past year, 115 new (under construction) regular garbage transfer stations and treatment facilities have been built in the whole province, and 14706 rural informal garbage dump sites have been located and investigated in the whole province by the end of June 2018. Through the implementation of the global special waste-free control action, the urban and rural environmental health has gradually improved, and the awareness of public participation and environmental health protection have increased significantly.

There are still many shortcomings in the construction of the urban-rural areas in our province, especially the gap between urban and rural areas in infrastructure and public services. In the future, the construction of beautiful rural should drive the integration of urban and rural infrastructure and public services to make up for the shortcomings of rural construction; continuously improve the capacity of urban and rural garbage and sewage treatment, enhance the urban and rural environment by the action of global waste-free treatment; improve the management capacity of urban public infrastructure, and improve the quality of urban livability by fine management.

需要全本请访问 www.ertongbook.com