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要赢得全球的商业竞争 敢问路在何方？



全球商业竞争的新规则

Changing Competitive Landscape

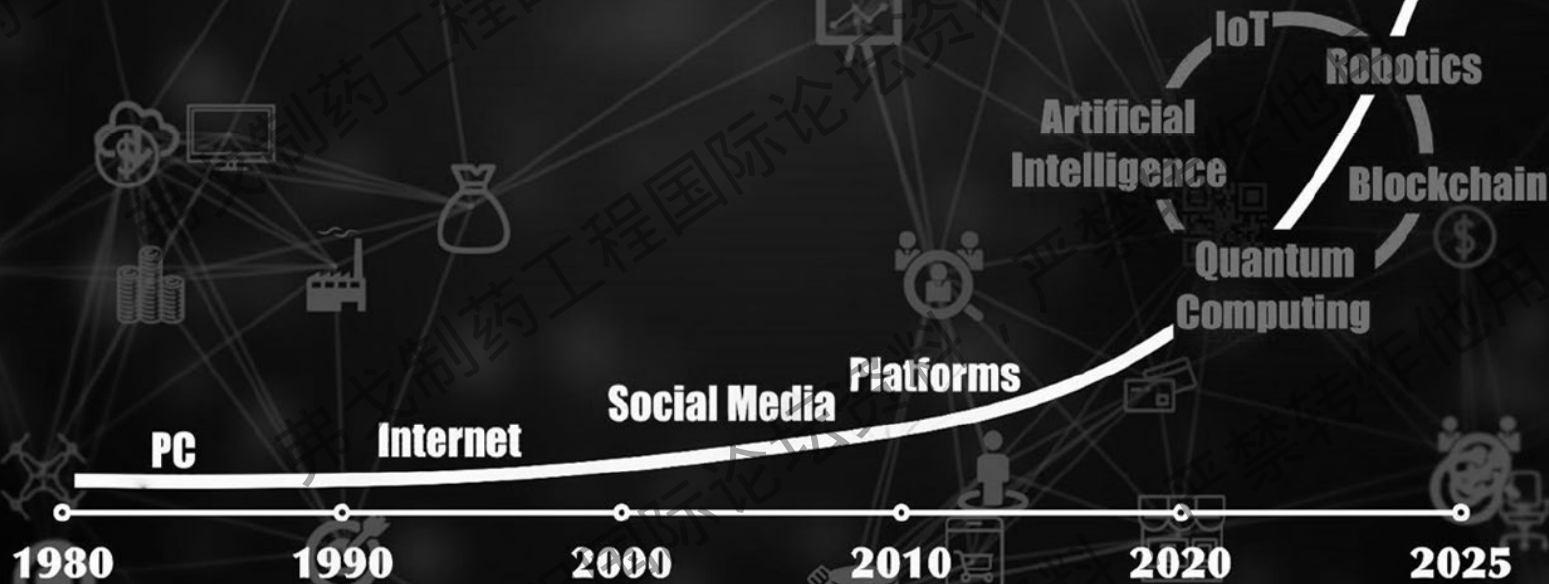
It is all about the **data**

- Merck – smart factories
- Pfizer – connected manufacturing
- Sanofi – digital twins and AR
- Johnson & Johnson – Apple partner

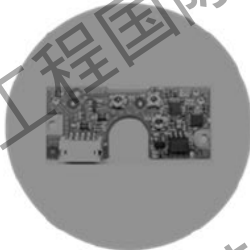


Emerging Technologies

创新的智能科技 C&C: Connection & Computing 连接与计算



Connected World



创新的智能科技 C&C:
Connection & Computing 连接与计算

物联网 影响了 生物制药

Is IoT the Answer?

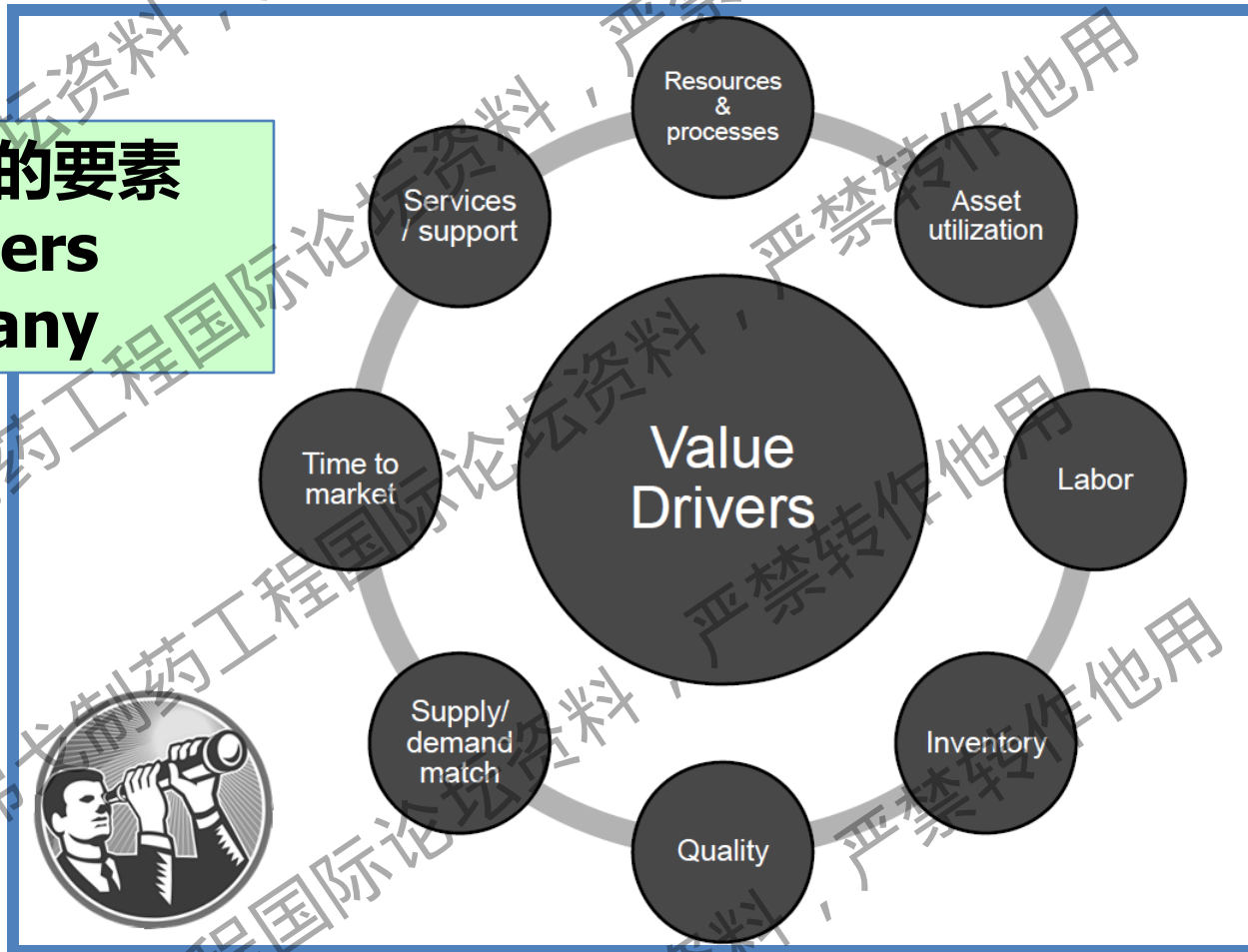
Emerging Biotech Demand

- Lower Costs
- Disposables consumables
- Reconfigurable shop floor
- Continuous Bioprocessing

IoT Promise

- Standardized, lower-cost technologies
- Auto-subscribing devices
- Smart eco-system with "location aware" devices
- Scalability from PD to Commercial

公司 价值提升的要素 Value Drivers of a company



Information flow

– a strategic requirement

生物制药 需要打通 信息流

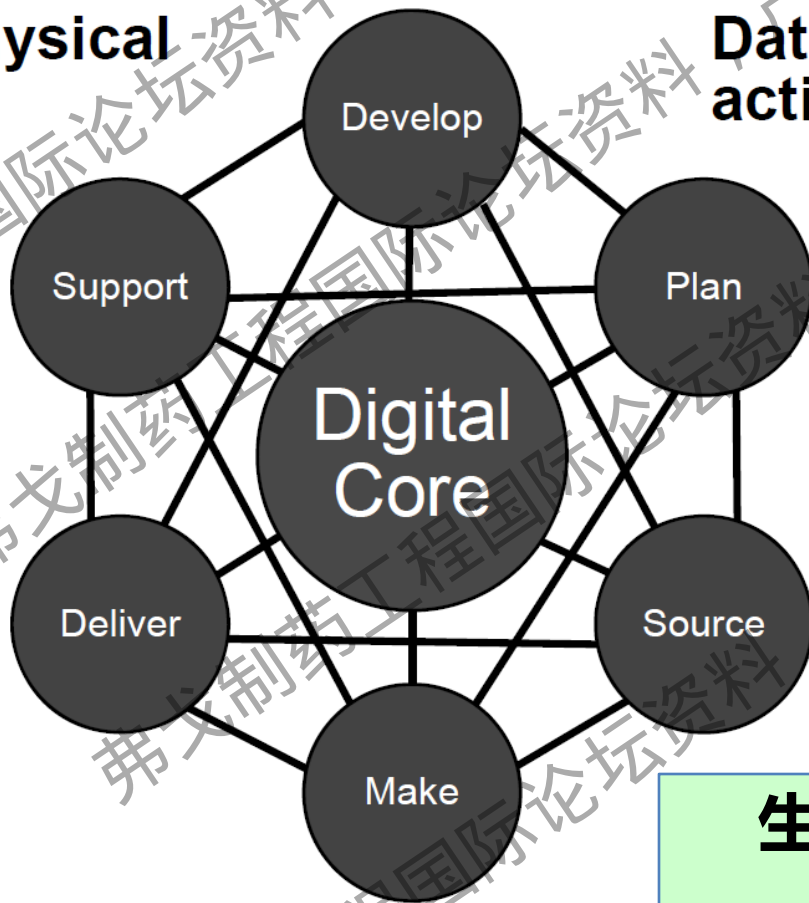
Suppliers

Organization

Customers

**Cyber-physical
systems**

**Data drives
action**



**生物制药 如何 利用好
数字化技术**

Data Itself Makes No Sense... We need INFORMATION!

把数据 转化为 信息
把信息转化为 竞争力

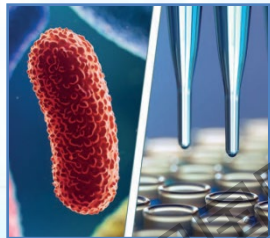
Life during Industry 4.0

- Move production closer to customers
- Establish data standards for interoperability

General areas of focus in Bio-manufacturing: 公司运营管理 焦点 Large Bio-Pharma Company

- **Asset Performance Optimization (APO) 资产效益**
- **Digital Performance Management (DPM) 数字化绩效**
- **Integrated Quality & Real Time Release 质量管理与实时放行**
- **Smart Factory 智能工厂**
- **Materials Science 材料科学**

生物制药行业的未来



对人类健康的 贡献

社会对行业的 期待

生物制药 未来的巨大变化 Bio-Pharma 4.0

BioPharma 4.0:
the Next Bio-Industrial Revolution
in
Bio-Manufacturing for
Operations Management,
Automation, Process Controls
and
Decision Making

社会对行业的期待 + 生产力的竞争

Market Trends & Business Drivers – The Why

Cost pressure

- Payer pressure
- Biosimilars
- Development

Uncertainty

- Regulatory approvals
- Demand variability
- Competition

Market Growth

- Emerging markets
- Global reach
- In region manufacture

New Product Classes

- Non-mAbs, ADCs
- Gene therapy
- Cell therapy

Cost

-90% manufacturing cost
-90% CAPEX

Flexibility

-90% changeover
Demand response

Speed

-70% build time
-80% lead time

Quality

10x robustness
-90% cost of quality

Biomanufacturing scenarios – The What (Facility types)

5. Small-scale <50L for Personalized Medicine

4. Small-scale <500L Portable Facility

3. Intermediate-scale Multi-product Single-use Fed Batch

Drug Product
Low volume

2. Intermediate-scale Single-use Perfusion

Drug Product
High volume

1. Large-scale Stainless Steel Fed Batch

Scale ←

→ Distributed

FoF to Support Next-Generation's BioProcessing with a Multidisciplinary Pursuit



展望行业的未来

Looking to the Future



**Modernizing
FoF for Bio-MFG:
A Continuous
Effort
by
the
Industry**



BIOMANUFACTURING INNOVATION

FUTURE BIOMANUFACTURING



BIOHARMACEUTICALS



VALUE-ADDED
MFG MATERIAL



ENGINEERING MATERIAL
FOR FACILITIES

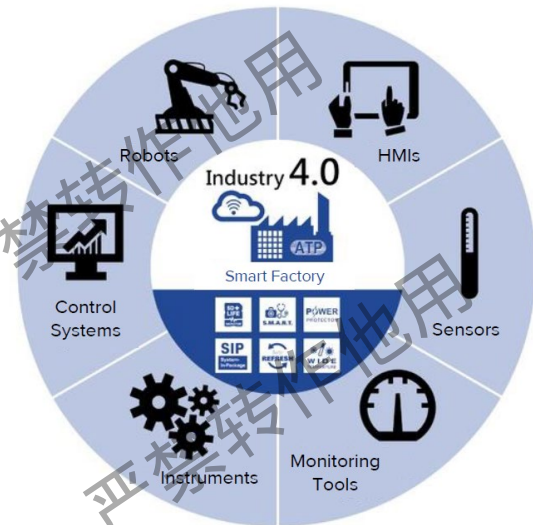


ADD INTEGRATED STRENGTHS IN BIOMANUFACTURING

21世纪的抗体药物 新一代的生产设施

工艺技术需求的增加，对产品质量的确保，对环境的影响减小，生产成本（COG）的压力，以及生物制药行业的最新技术的发展（连续生产），极大地增加了新厂的设计、建造和工厂合规及有效运营的挑战。

21世纪，行业会不断地扩展，也对各种平台技术和系统有更多的需求。



数字化转型

Digital Transformation

在这个世界中，数字渠道成为主要的（有时在某些情况下，也是唯一的）系统整合模型，而自动化流程则成为生产力的主要驱动力，也是灵活、及时、透明和稳定的生产管理与供应链运行的基础。

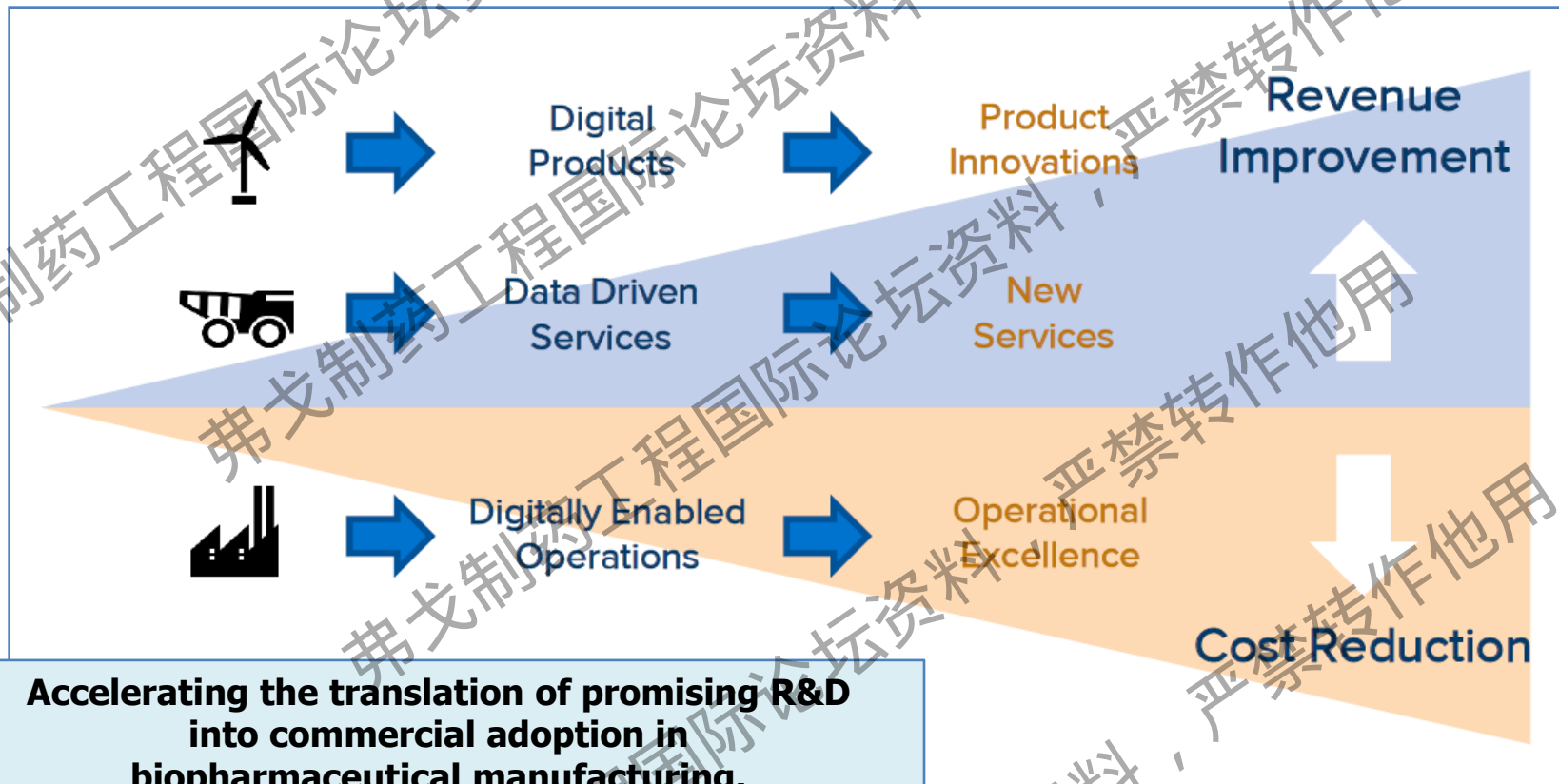
ICT: Information & communication technology (ICT)-enabled technologies

通信，计算，人工智能，和生产自动化方面的创新，都是使我们进入一个以前只能想象的世界。生物制药行业不能免于这种快速变化的步伐。这包括工艺和设施的设计与操作。当今最先进的生物制药工厂正在以前所未有的速度全面变化。从药物的开发到最终的制剂生产，未来的设施（FoF）在所有的这些领域中，都将拥有新的东西。

作为生物制药 4.0 (B4.0) 联盟, 波士顿咨询集团 (BCG) 和爱尔兰 国家生物加工研究与培训学院 (NIBRT), 在都柏林建立了 数码化运营创新中心 (ICO) Digital Innovation Center in Operations.



Digital Transformation 数字化转型

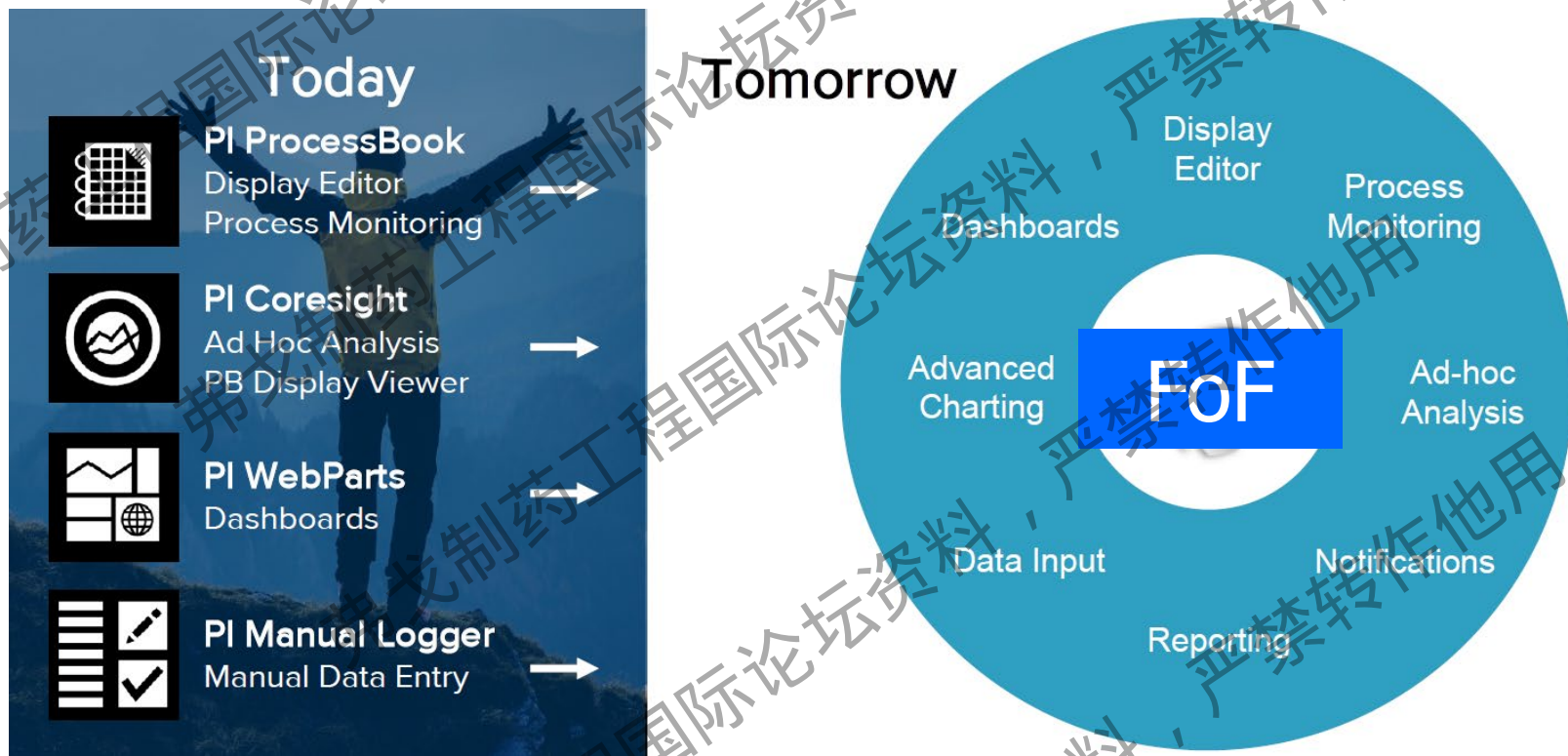


Digital Transformation 数字化转型

The Data Transformation Journey: Meeting Specific User Needs



信息的及时、可视化 (在FoF 未来工厂)



数字技术集成在整个站点中，包括企业资源计划系统ERP与电子生产记录MES，过程控制系统PCS，数据库和实验室信息管理系统LIMS的集成。这个数字平台简化了产品的制造MFG、检测QC和放行QA。它还支持强大的数据管理，以支持开发活动和工艺表征。

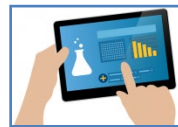
公司的系统，可以管理：

- 利用一次性设备和数字设备，跟踪生产情况，可以快速重新配置空间。
- 多个灵活的cGMP生产套间，用于制造：mRNA药物、配制原料药、无菌药品、个性化癌症疫苗（PCV）、关键原材料，
- 原料发酵和缓冲液制备
- 包装，贴标签和存储西林瓶产品的空间
- 进出产品的温度控制仓库
- 品管实验室
- 规模化和毒理学生产的中试车间
- 研究级mRNA的生产空间
- 洁净公用系统，包括纯水和注射用水



Data Integrity

FOF设施会越来越容易使用。它将可能是具有灵活设计的模块化设施，该设施利用某种形式的连续制造和封闭系统，来消除当前配置的高级别洁净室的必要性。



本地化的控制和自动化，将有可能被越来越开放的源代码集中控制的制造系统所取代。由于采用了实现这些目标的新方法，并且工艺变得更加连续，由于无菌保证和可清洁性技术的发展，将使得批次的失败变得越来越少。

未来的设施将利用物联网（IoT）来建立数字化发展。这将使生产过程中的人工干预最少。FOF将通过高度优化的一次性工艺流程实现更高的滴度生产，并提高产品产量。

通过生物制药工艺的开发和执行产生了大量的数据。预计随着制造商和制造商将新型传感器、智能材料、过程分析技术和过程自动化集成到实验室和制造工厂中，生物制造数据的数量和复杂性将成倍增长。数字化战略结合了包含AI、预测建模和可视化的结构化数据集成和分析平台，以及数字转换，来推动下一代的智能化生物制药。

FoF 智能化 解决方案

- 生物药品检测技术、工艺控制和监控、
- 与数字化转型相关的新技术，能给制药供应链带来重大变化。
- 绝大多数的生物制药公司将主数据管理（MDM）列为供应链转型的重要驱动因素。
- 数字化转型，将支持下一代工艺的开发和生物药品的制造
- 涵盖各个职能：Process Development, Analytical Method Development / QC, Tech Transfer/GMP Manufacturing, Regulatory Compliance, Outsourcing, Project Management, Operational Excellence OPEX

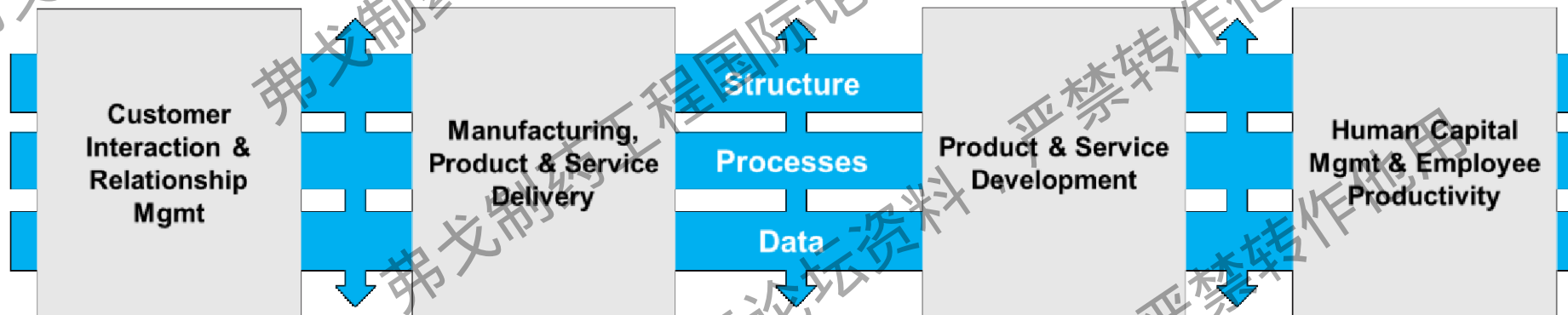


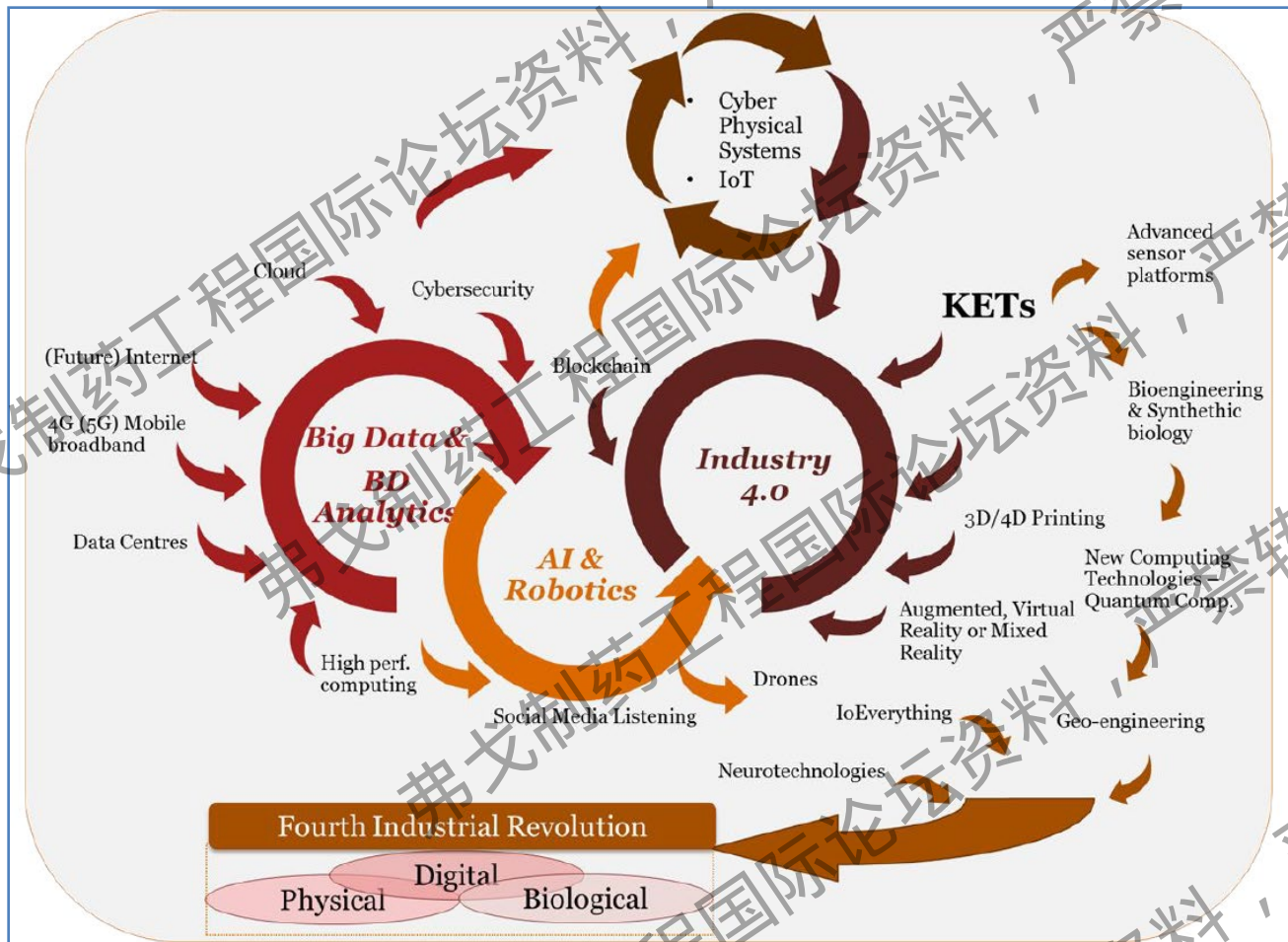
生物制药 行业的挑战：生产与合规

- 以分布式控制系统（DCS）为基础，构建未来设施。选择并安装合适的解决方案和设备，包括增强现实和实现高级分析等创新技术。
- DCS，建立在开放式以太网上，可为移动设备提供智能工作站和无缝的即插即用连接。它提供从ERP到车间的统一集成，并提供实时仪表板。
- 当员工在整个工厂中拥有可以跟随他们的平板电脑或移动屏幕以进行生产管理时，他们的工作会更加有效。
- 总的来说，由于设备都已连接，数字化系统会减少对系统操作的人为干预和报警的工作。

数字化转型

Digital transformation of the company is a deep transformation





第四次 工业 革命

高效、柔性的未来工厂 Efficient and flexible FoF

Smart supply network

Efficient supplier network that enables optimized decision-making

IoT-enabled

Integrated sensors in process stream data continuously

AI-enabled

Real time analytics with own engine for decision-making

Mobile workforce

Workforce enabled with wearable technology uses AR/VR

Digital-physical systems

Advanced robotics and 3D printing complement processes

Advanced materials

Nanotechnology and new materials used extensively

Smart products

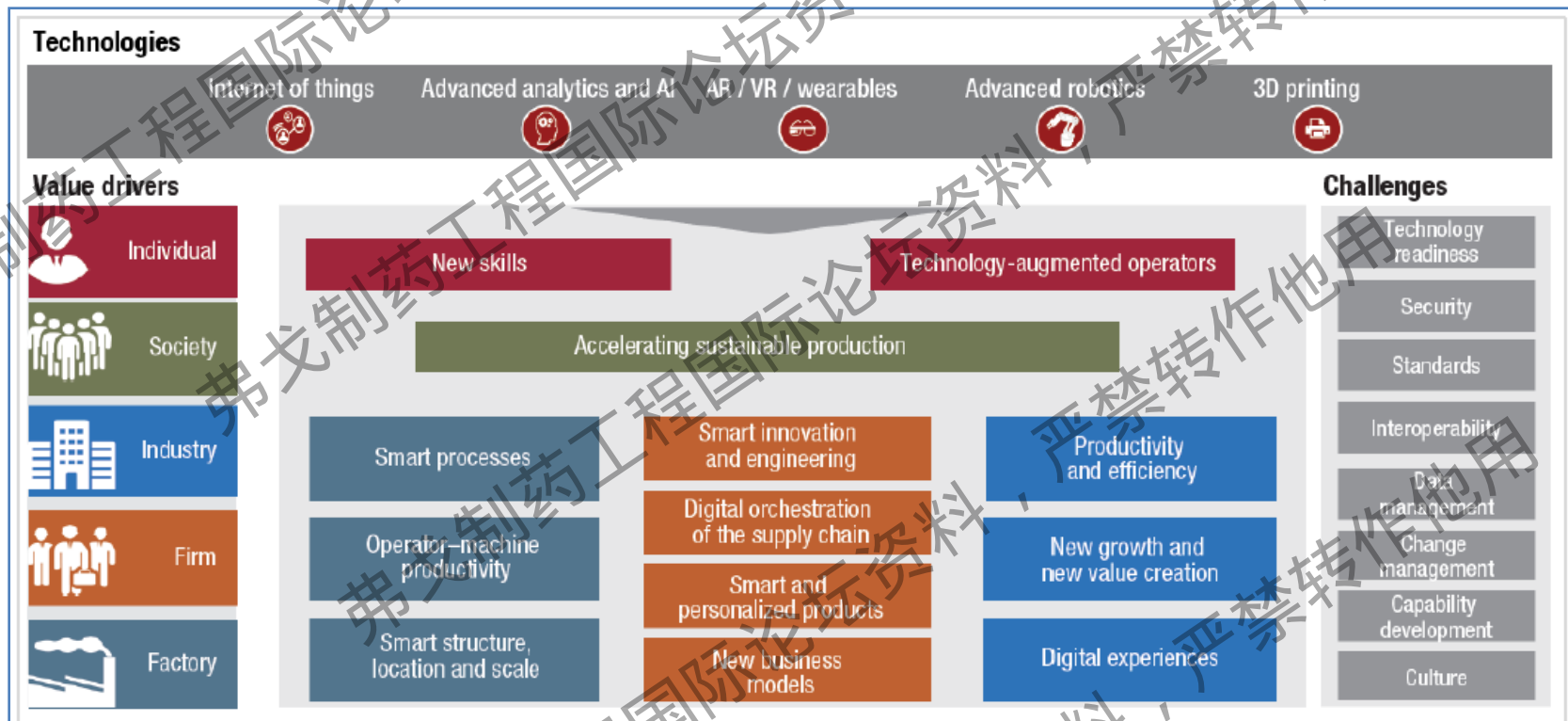
Products carry information to manufacture themselves

Smart products

Customer interaction through the process chain



生物制药 的智能化：生产与合规



Information Technology with Operational Technologies



Information technology

1970s:
Mainframe

1980s:
ERP

1990/2000s:
Internet, ERP,
modules, MES, etc.

Market factors:

- Increasing degree of automation
- Adoption of lean manufacturing and six sigma principles
- Arrival and integration of enterprise IT systems

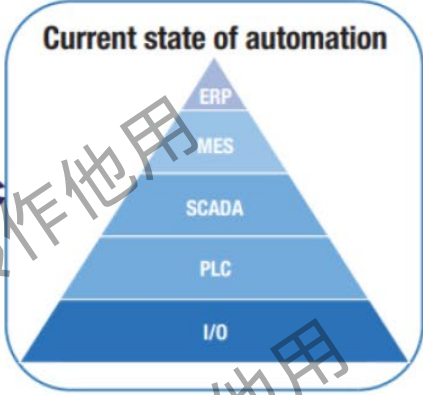


Industrial automation

1970s:
Direct digital control

1980s:
Remote I/O,
Logic control

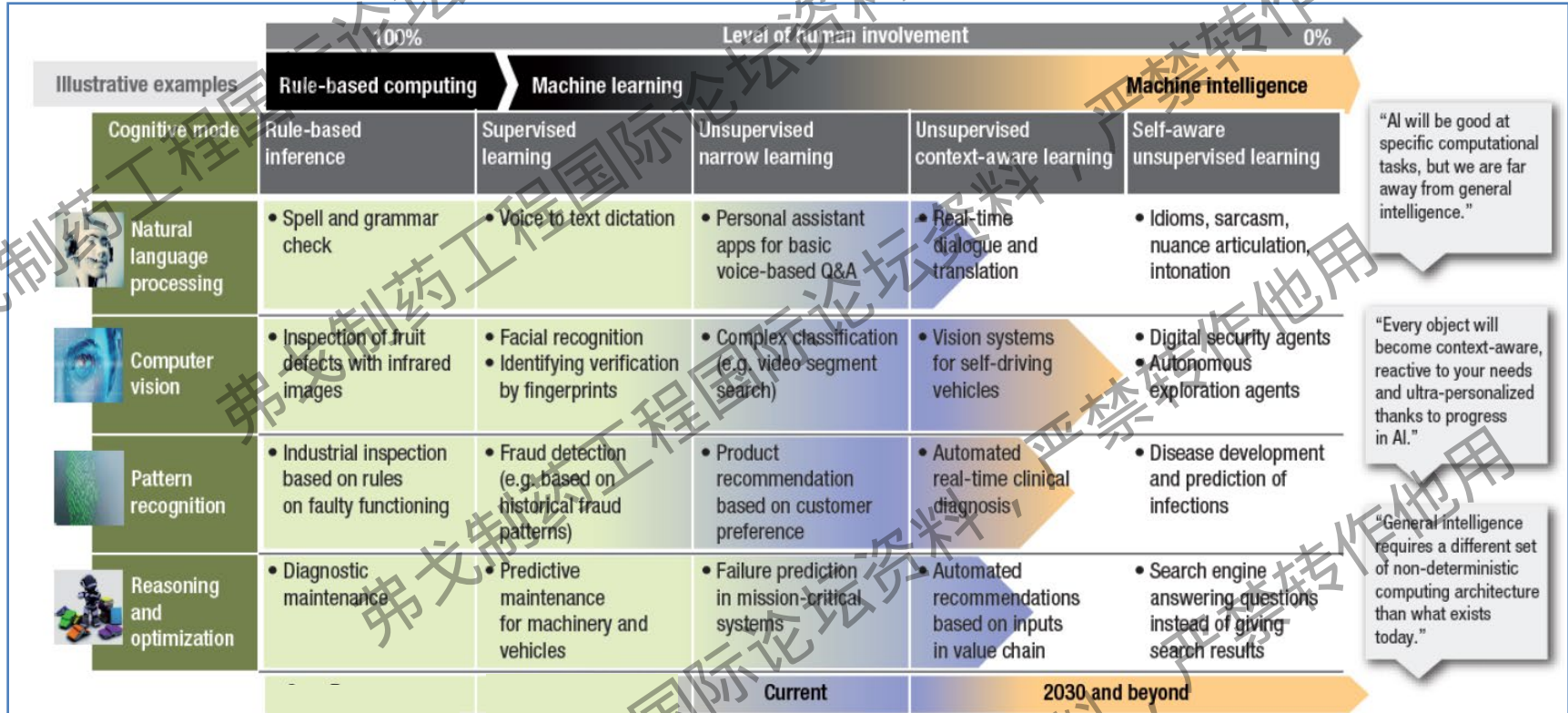
1990/2000s:
Fieldbus
protocols/TCIP



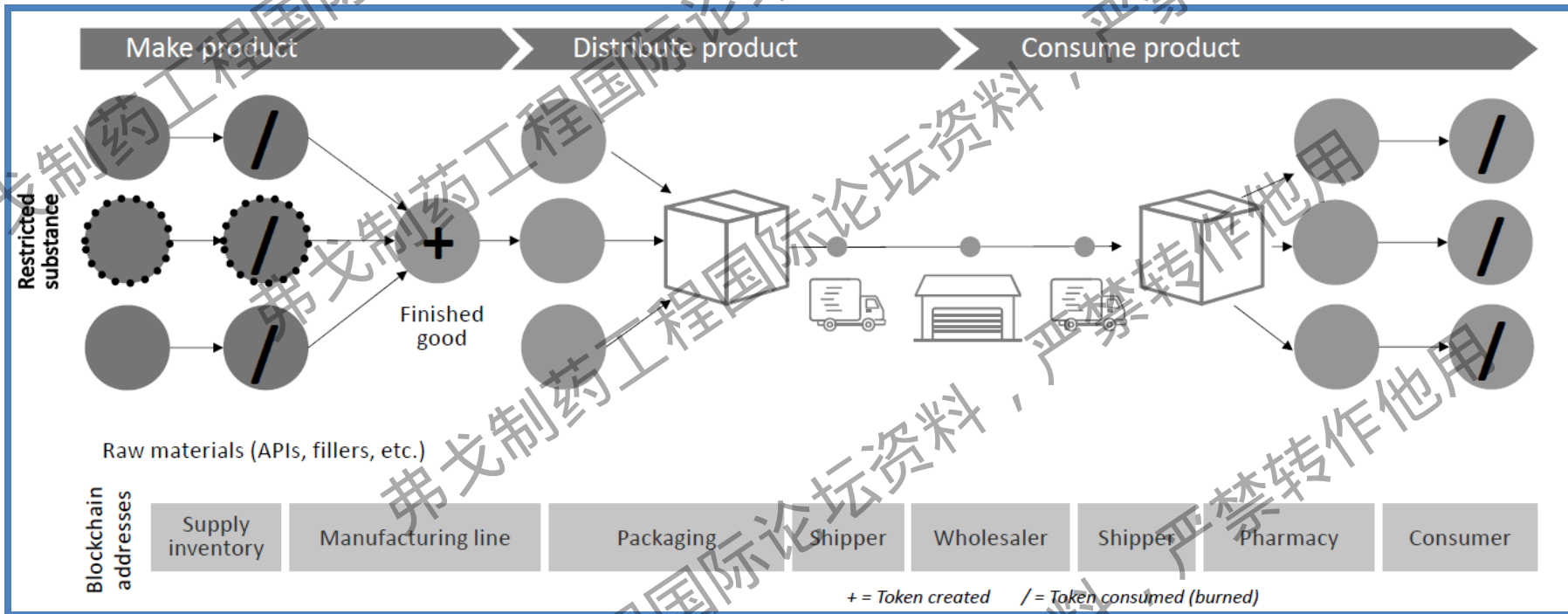
Convergence of the two worlds is creating a huge opportunity for production through the IIoT

Note: ERP: Enterprise resource planning; MES: Manufacturing execution system; TCP: Transmission control internet protocol; I/O: input/output

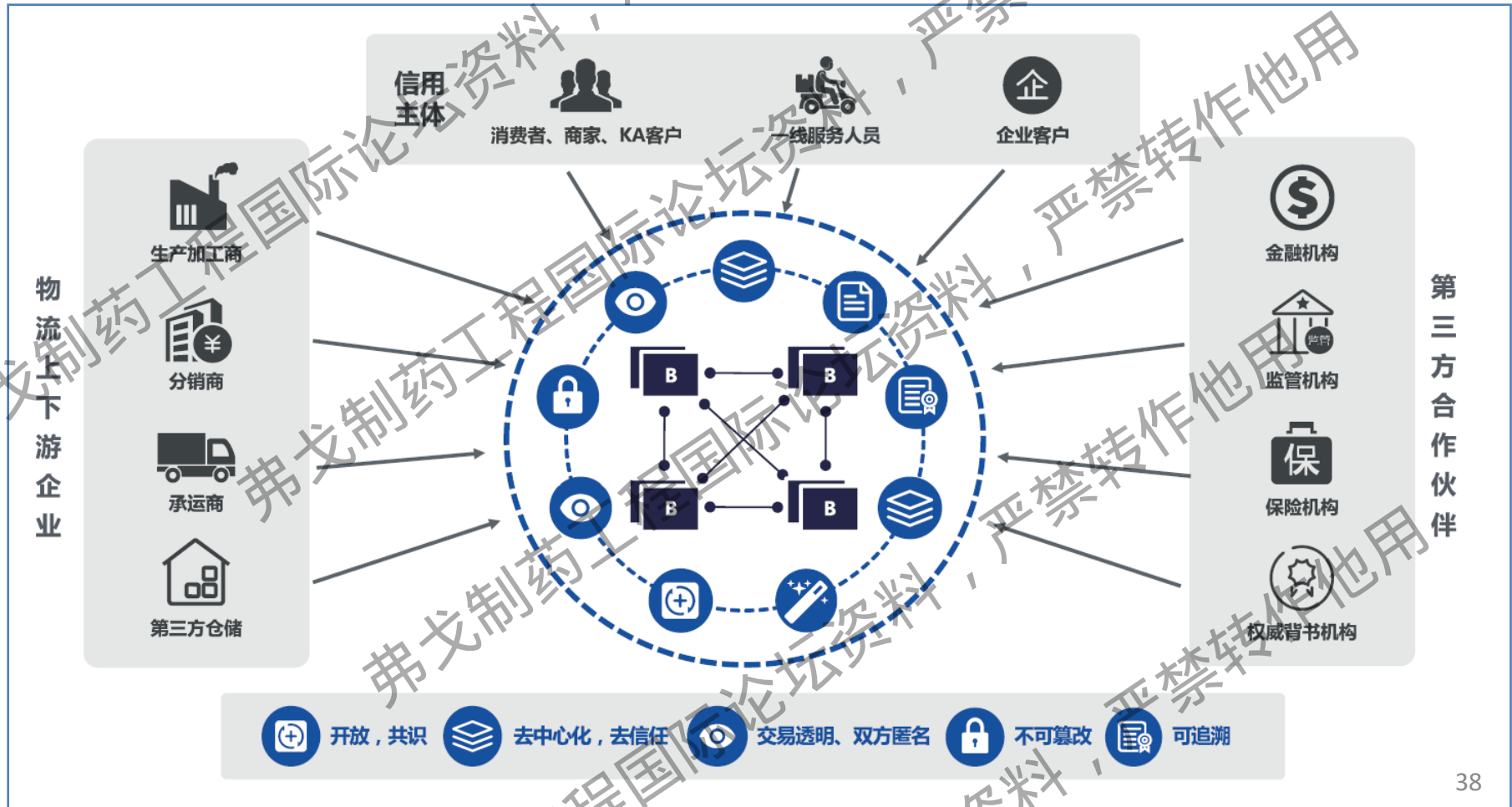
Development of AI and its future state



区块链与供应链管理









流程优化



物流金融



物流征信



物流追踪

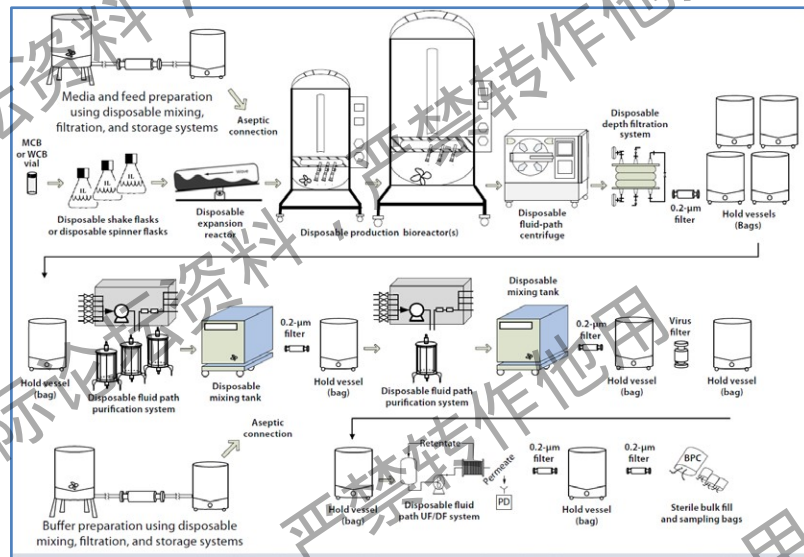
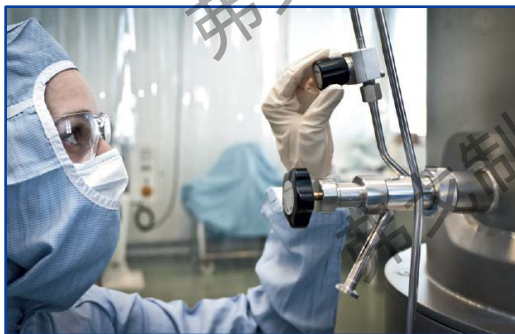


MFG Process 生产工艺的核心事项



生物制药的未来设施
FoF: The facility of the future

FoF: Beyond
MFG Process
不只是生产工艺



Bio-Manufacturing Organization

生产信息的智能化 Manufacturing Intelligence (MI)

Right First Time

Processes are defect-free and free from workarounds. Visibility to poorly performing processes and methods enables the organization to align on improvement activities.

Continued Process Validation Life Cycle „QbD“

Clearly demonstrate control of risk to product quality and assure continually that the process remains in a state of control.

Real-Time Predictive Process Control

Real-time control and optimization of the processes and alerts through predictive analytics allows operators to adjust parameters enabling higher yields and reduce loss

Optimize External Manufacturing Process

Evolve to a seamless distributed external partner network through a free-flow of data exchange, process collaboration, and product knowledge enabling early detection & improvement, oversight, and control visibility to performance

Targeted Continuous Improvement of Mfg Processes

Leverage data from internal and external sources to enable long term process improvements and cross-site comparability. Utilize dashboards to identify and measure the greatest improvement opportunities.

Sustainable Process Knowledge

Easy access to technical and production documentation. Centralize and share product data and know-how across the functions and across sites.

Enable Learning Organization

Enable continuous learning throughout product & process life-cycle to learn from development through qualification and commercialization across all functions and networks.

Predictive Maintenance

Utilizing a connected factory (Internet of Things) and self diagnostic capabilities, monitored machinery has the ability to ensure predicted product quality and automatically schedule just-in-time (JIT) maintenance and calibration to minimize equipment downtime

Core Asset: process /equipment data and product knowledge

生物制药的未来设施的功能

Functions of FoF

告知

诊断

预警

防控

Descriptive

- Visualization
- Dimension reduction
- Abnormality & Trend detection
- Alert systems

Diagnostic

- Process Understanding
- Failure analysis
- Trend & pattern explanation
- Decision support

Predictive

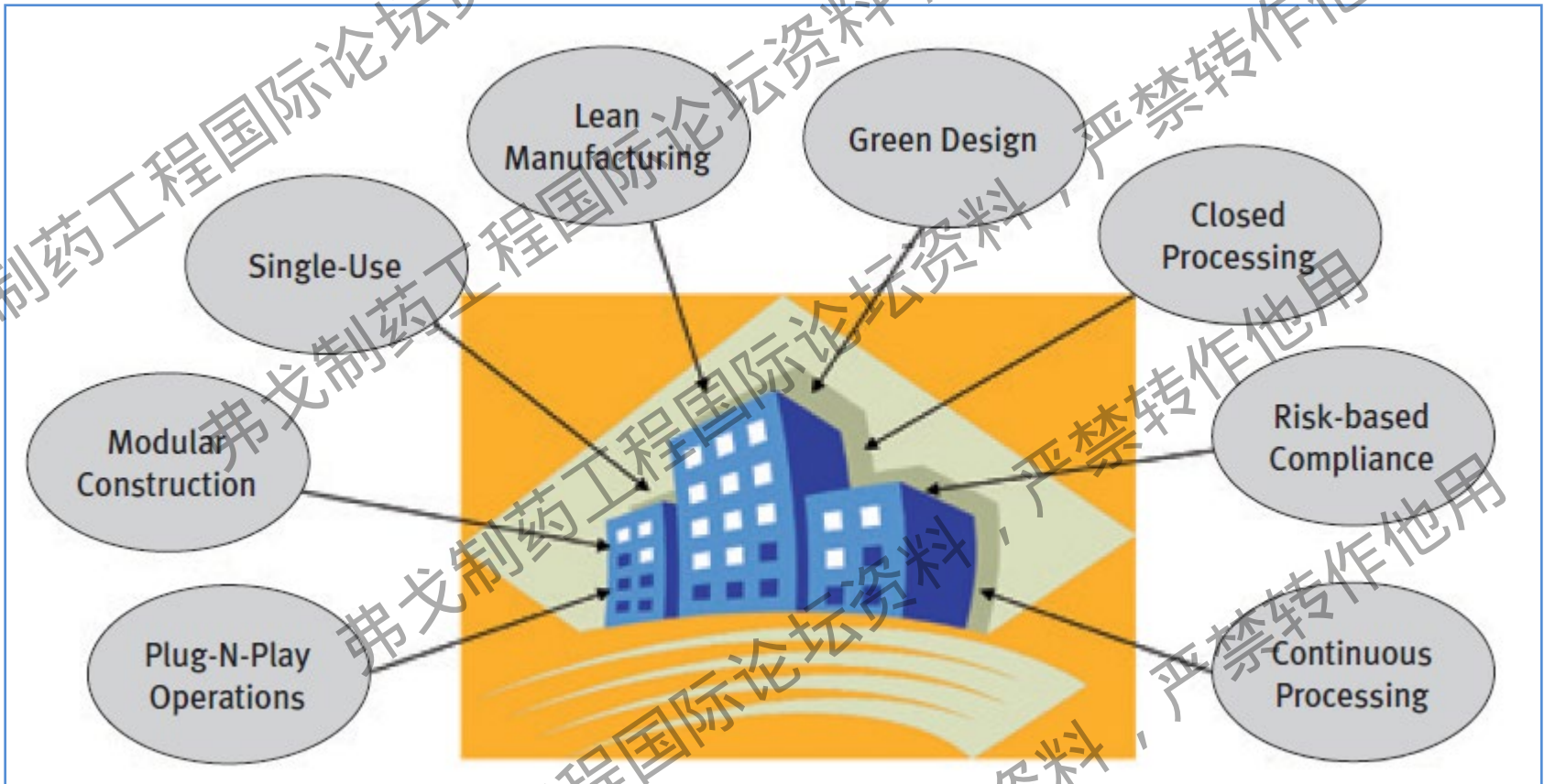
- Forecasting
- Soft Sensors
- Simulation & Scenario analysis
- Maintenance
- Planning support

Prescriptive

- Proactive decision support
- Process Control
- Process Automation
- Smart Factory

Model complexity

Requirements for the FoF



Sanofi, Location: Framingham, Massachusetts, USA

Project: Sanofi Digitally Enabled Integrated Continuous Biomanufacturing Facility



- From the early design phases Sanofi was dedicated to incorporating a full set of lean operations principles into the design. They have broken new ground in digital integration. The entire facility is run using a comprehensive suite of digital solutions.
- Plant performance is managed through electronic boards that allow real time visibility of performance metrics
- Issues are automatically escalated
- Trending of key metrics is available on electronic boards throughout the facility
- Full integration of PCS, MES, Historian, ERP systems with automated data transfer
- Electronic work instruction using pictures and videos
- Fully electronic batch records enabling review and release by exception
- Wireless instrumentation and RFID technology
- Common user interface and user experience across all suites, processes, and utilities

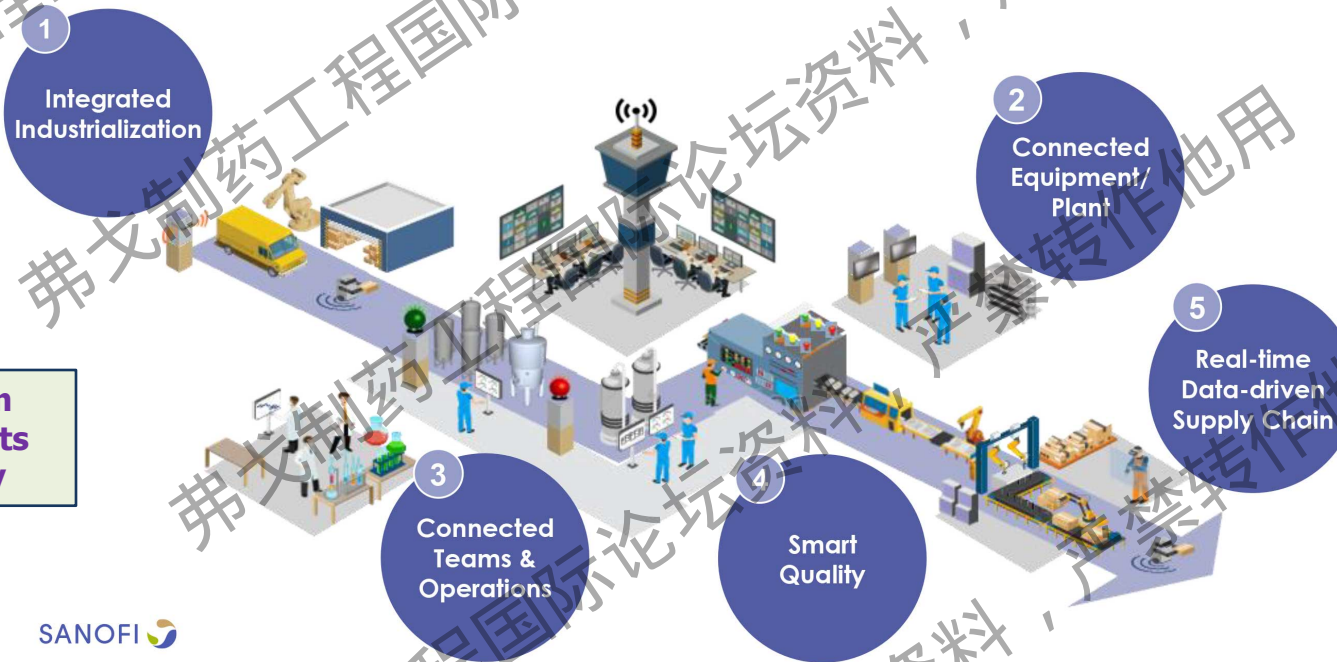
Digital Transformation 数字化转换

**They have pushed
the concepts of digitization
to fully integrate
process control, data collection, and analytics.**

This combined with a commitment to a “born lean” design philosophy has created an industry factory 4.0 lighthouse.

Digitally Enabled Integrated Continuous Biomanufacturing Facility

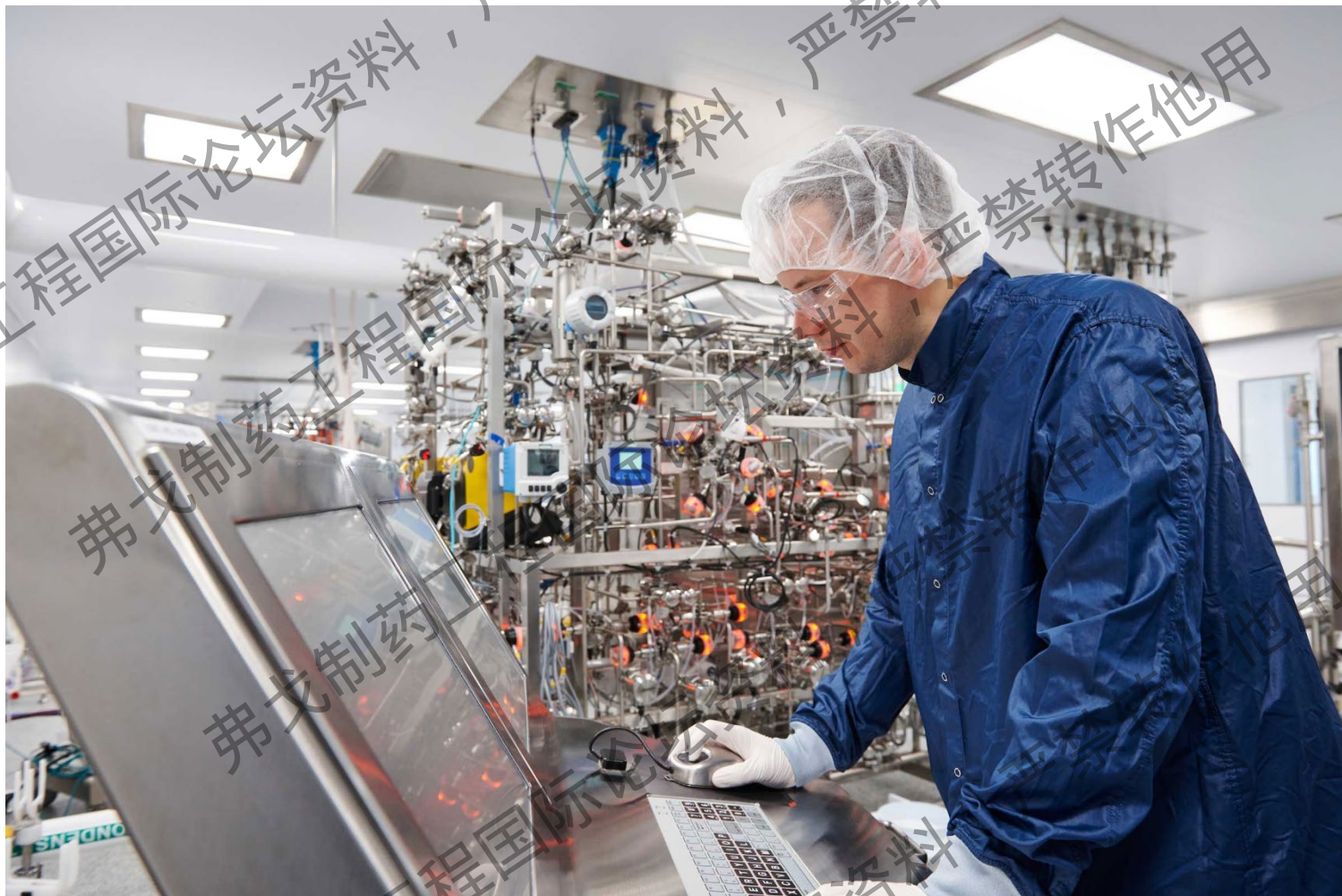
Factory of the Future at Sanofi



**Framingham
Massachusetts
USA Facility**

SANOFI 



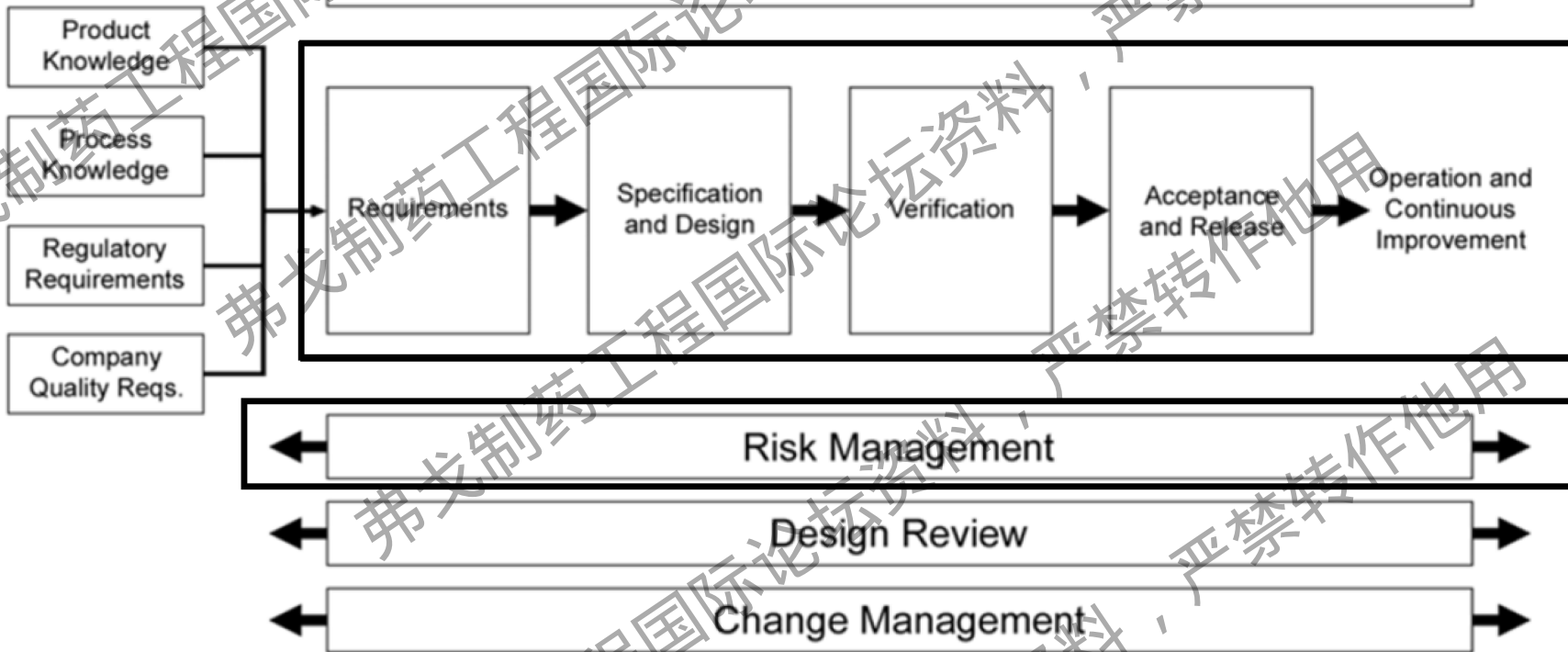






以GEP来建设 FoF 未来设施

Good Engineering Practice



系统建构的 V-模型

- What are the overall risks to the business?
- System GxP Determination
- What is the overall impact of the system?
- Are more detailed risk assessments required?

Consider

Initial Risk Assessment

User Requirements Specification

Requirements Testing

User Testing of Controls and Procedures

Iteration as required

Functional Specification

Functional Testing

Functional Risk Assessment

Configuration Specification

Configuration Testing

Testing of System Controls

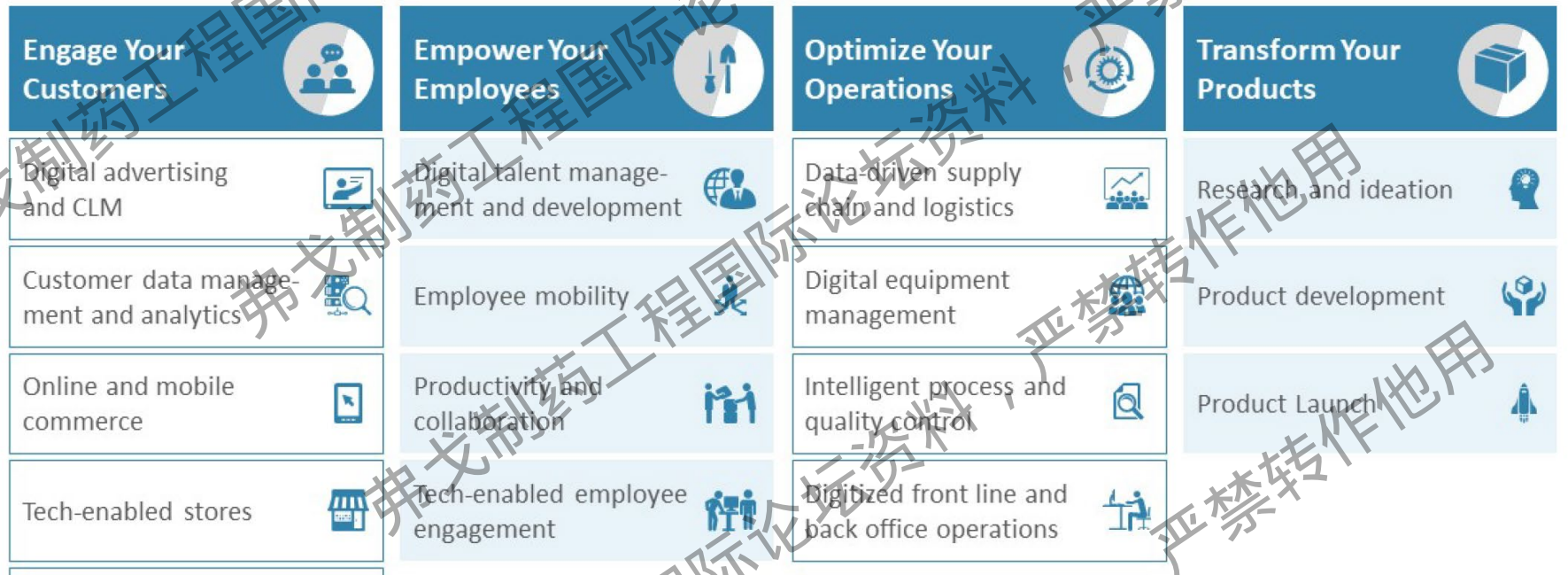
Identify and Define

Configured Product

- Identify risks to specific processes
- Identify risks to specific functions
- Define controls to reduce risks

DT 数字化转型 的效益

Digital Transformation Capability Model





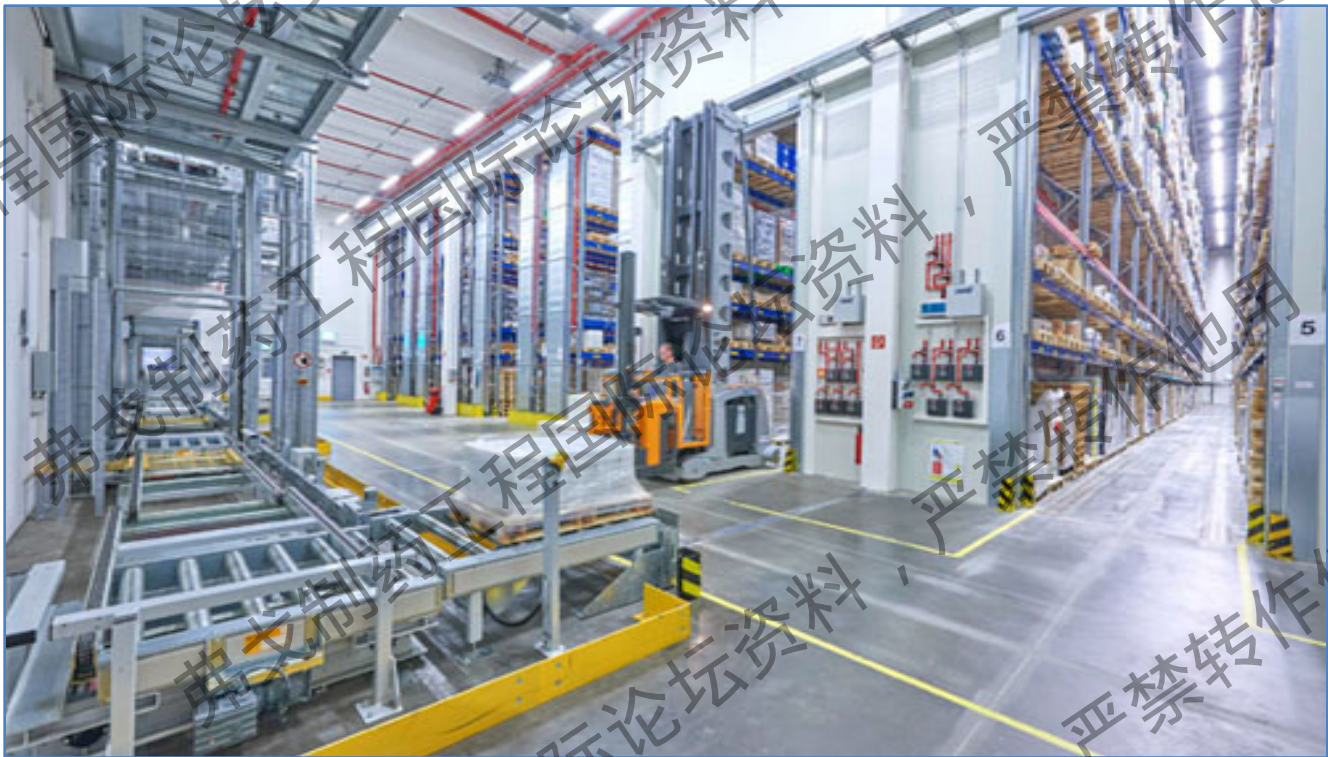


设施



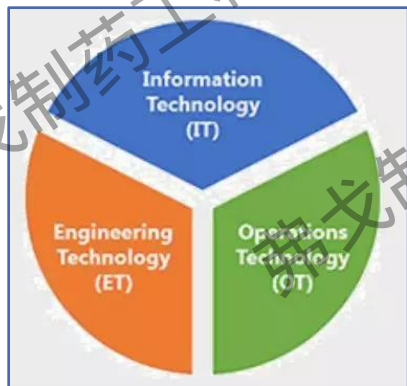


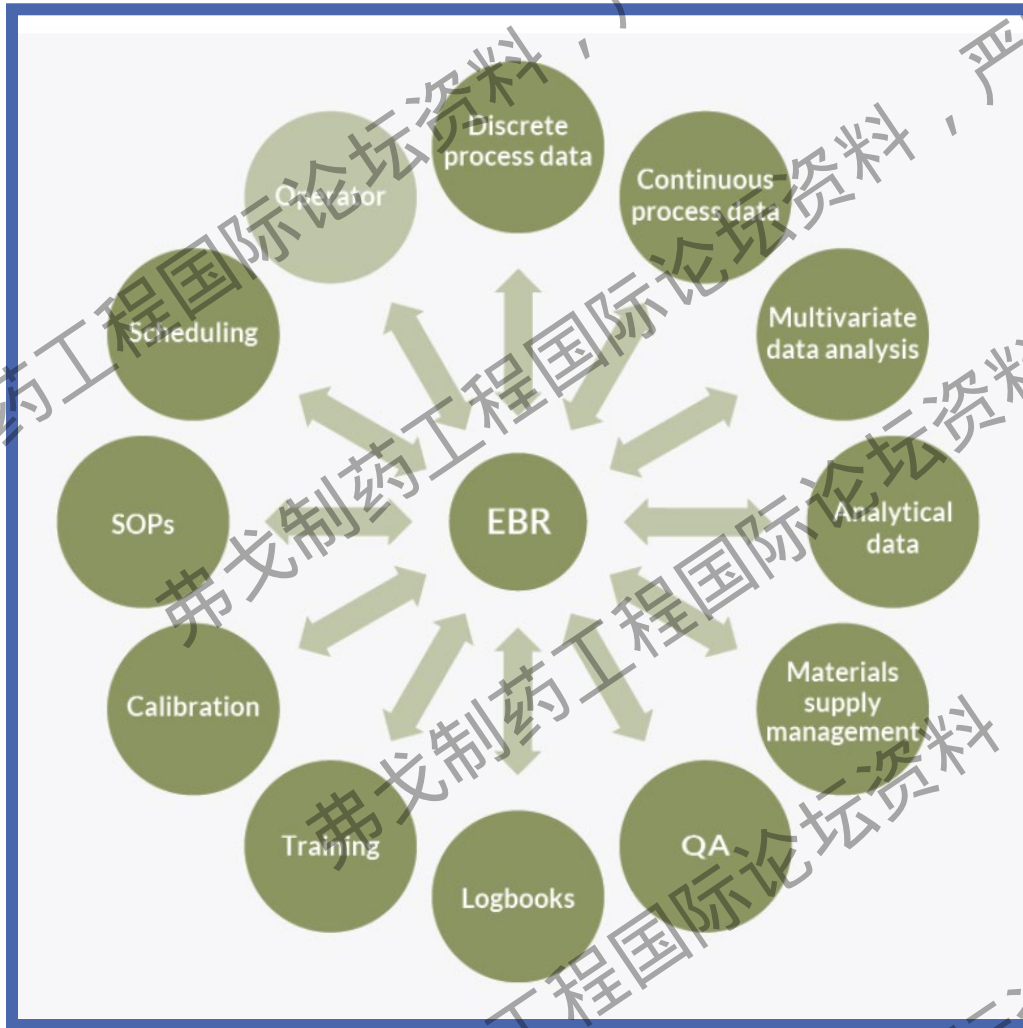
Technician interaction with Electronic Batch Records (EBRs) using Human Machine Interface (HMI).





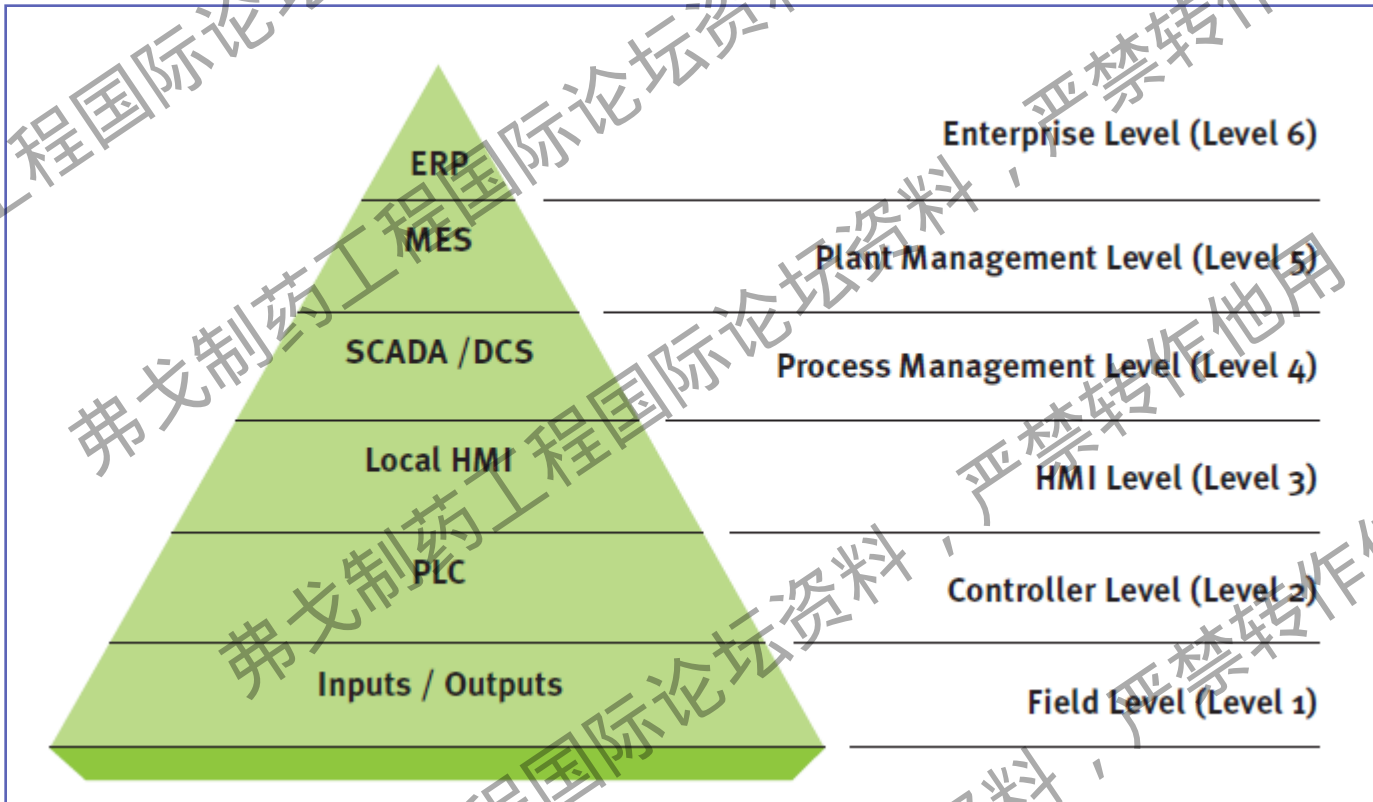
信息技术 IT & OT 运营技术 的融合

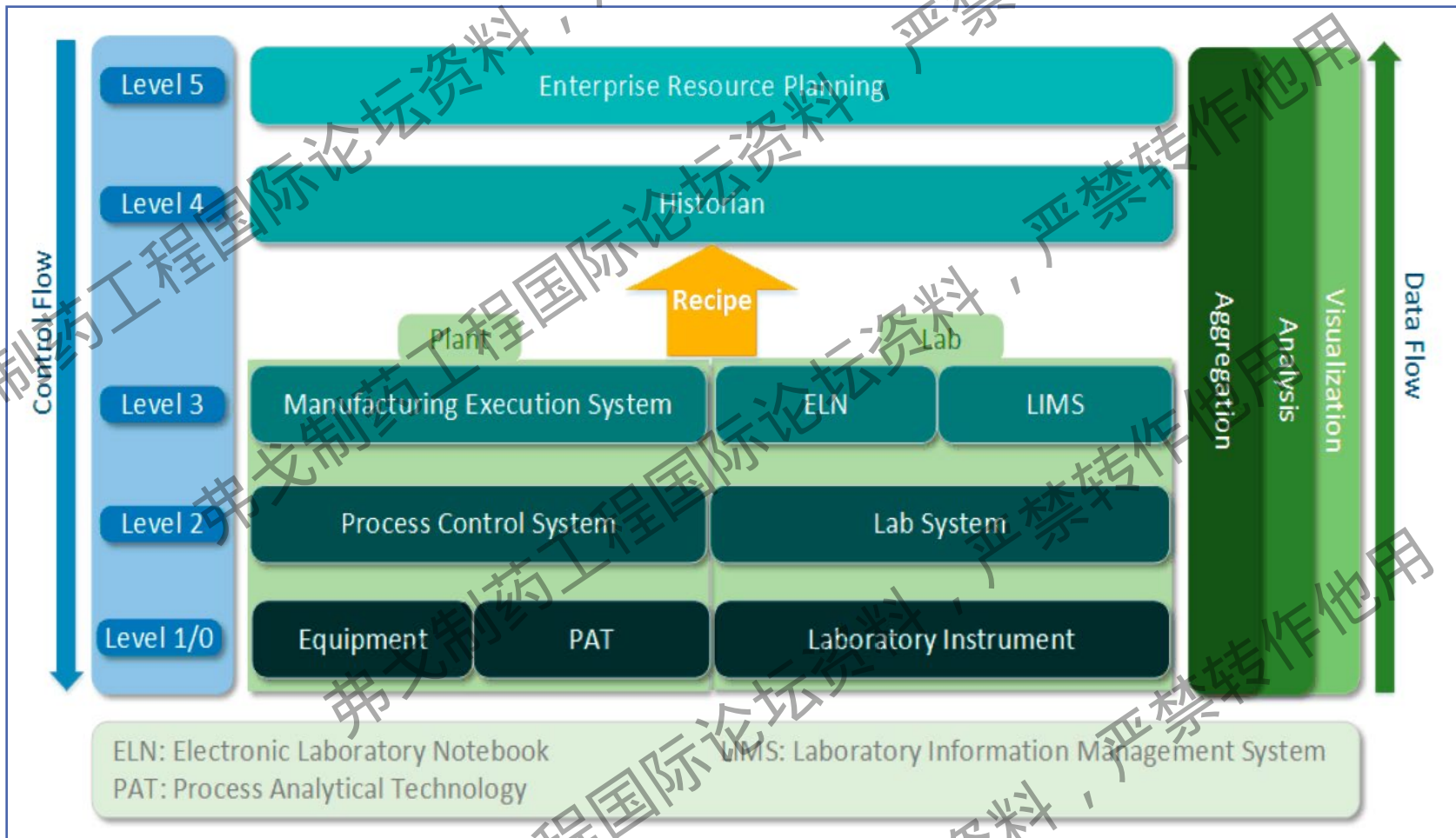




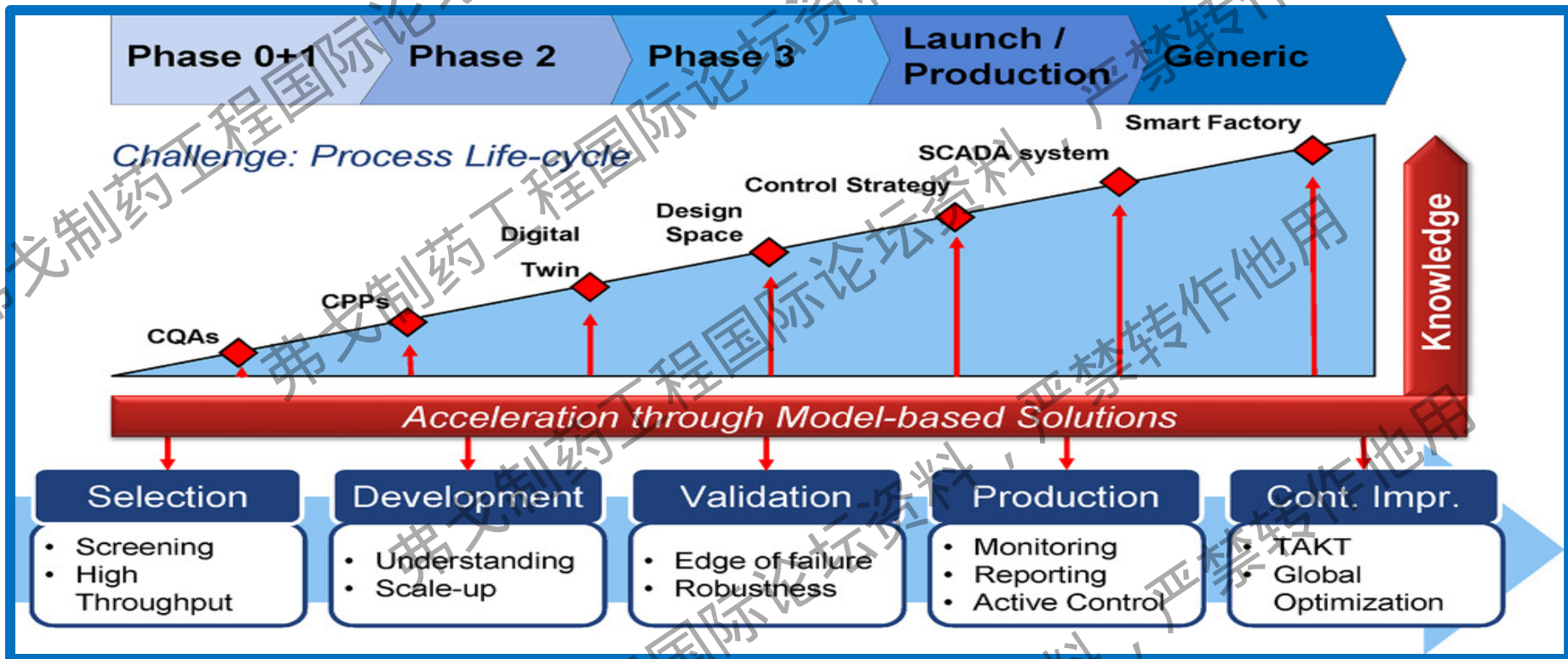
电子批记录 EBR

自动化 金字塔 The Automation Pyramid



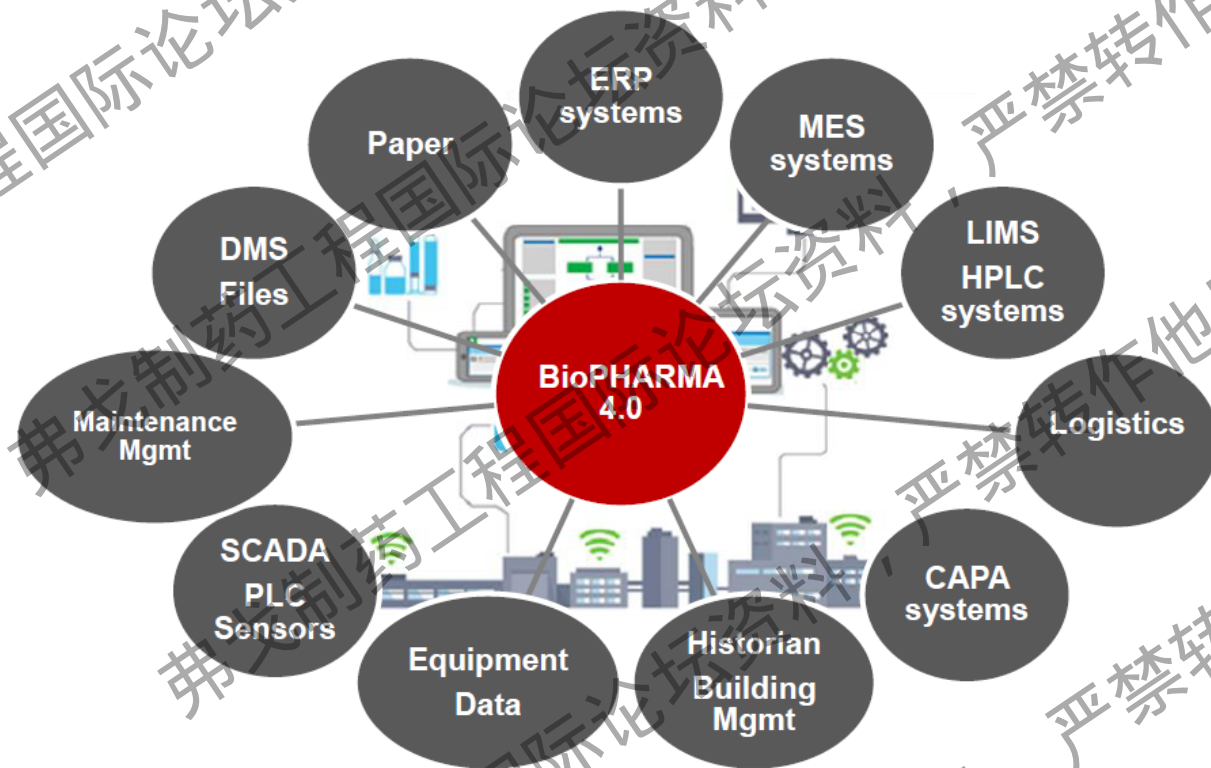


生物制药 数位化生产的时代 Bioprocessing in the Digital Age: The Role of Process Models 工艺模块的角色



End to End, Vertical & Horizontal Integration

Big Data: Overall Data Collection



Across the product lifecycle

数字化转型助力生命科学企业的机遇



高效
执行

加强各项流程的数字化与合理化程度，从而提升效率，节省成本，打造数字化文化，培养全新思维方式与能力



高效
互动

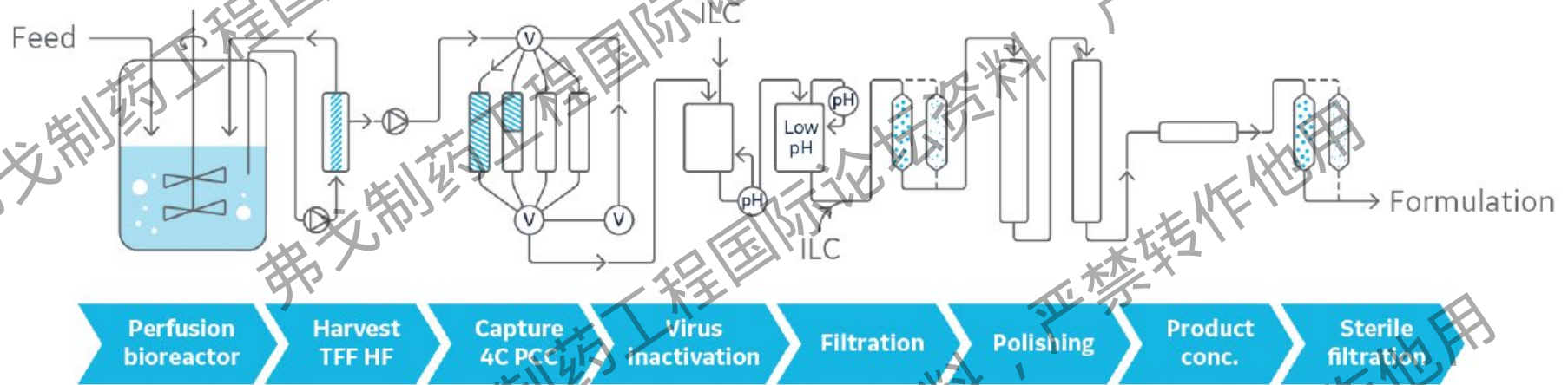
建立全新互动模式，打造并开展有针对性的互动活动，以满足客户/患者/员工的需求，提升忠诚度



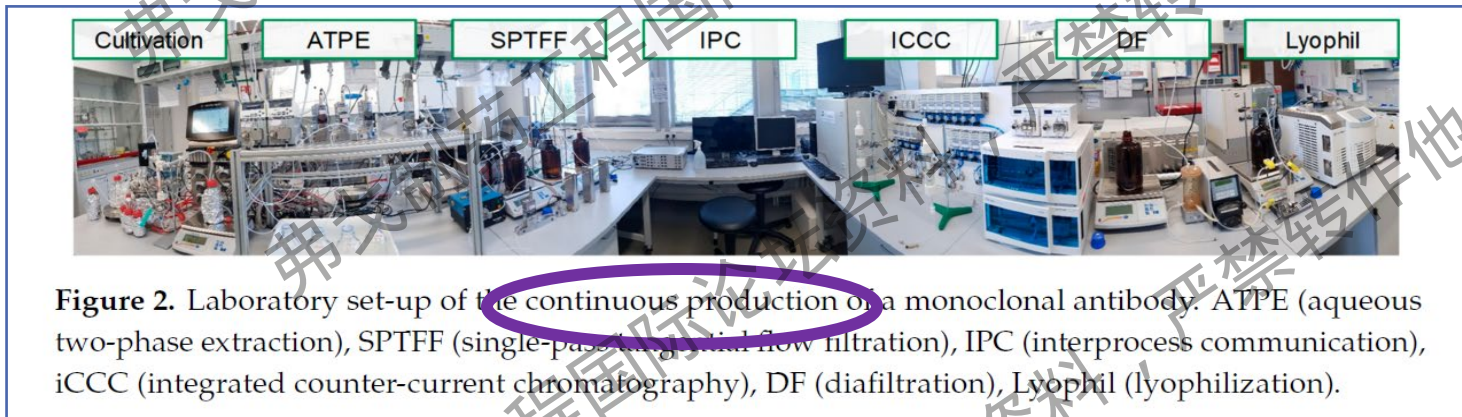
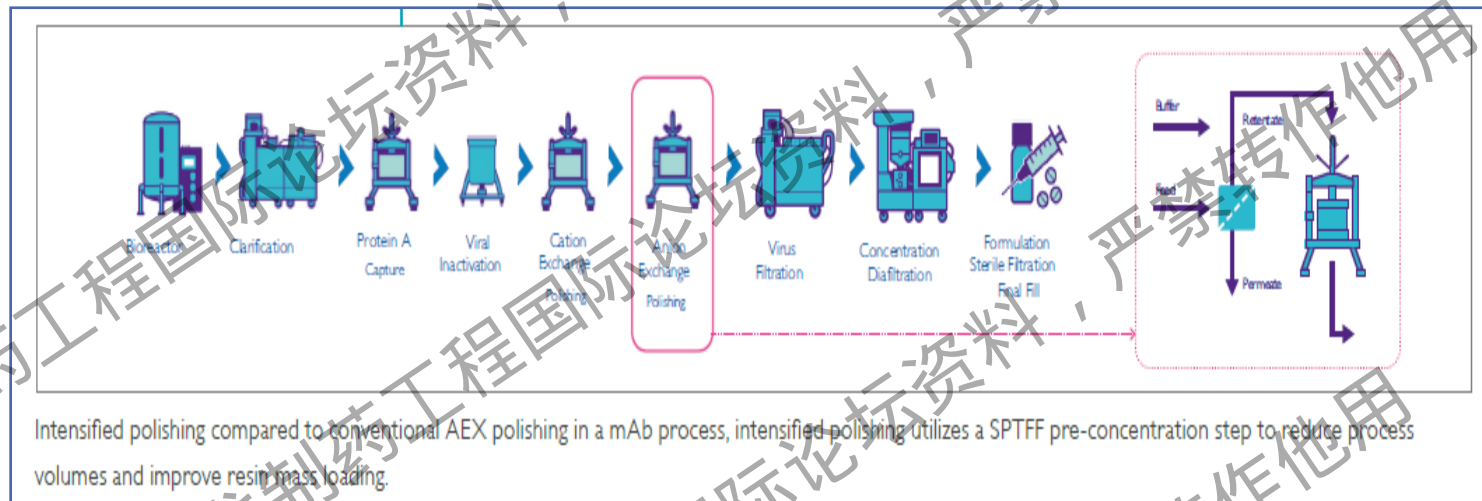
创新
产品与服务

加速开发产品、服务以及新的业务模式，运用数据与创新平台为客户增创价值

End-to-end upstream and downstream continuous processing



**TFF: tangential flow filtration; HF: hollow fiber;
4C PCC: 4-column periodic counter current chromatography**



FoF 未来设施 建设基础

FoF Project Enablers

Technology
standards

Real time
Release

Vendor
interaction

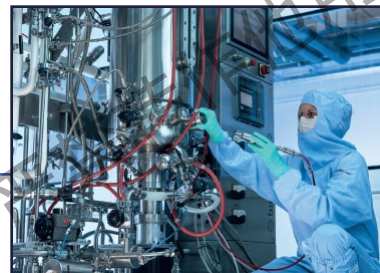
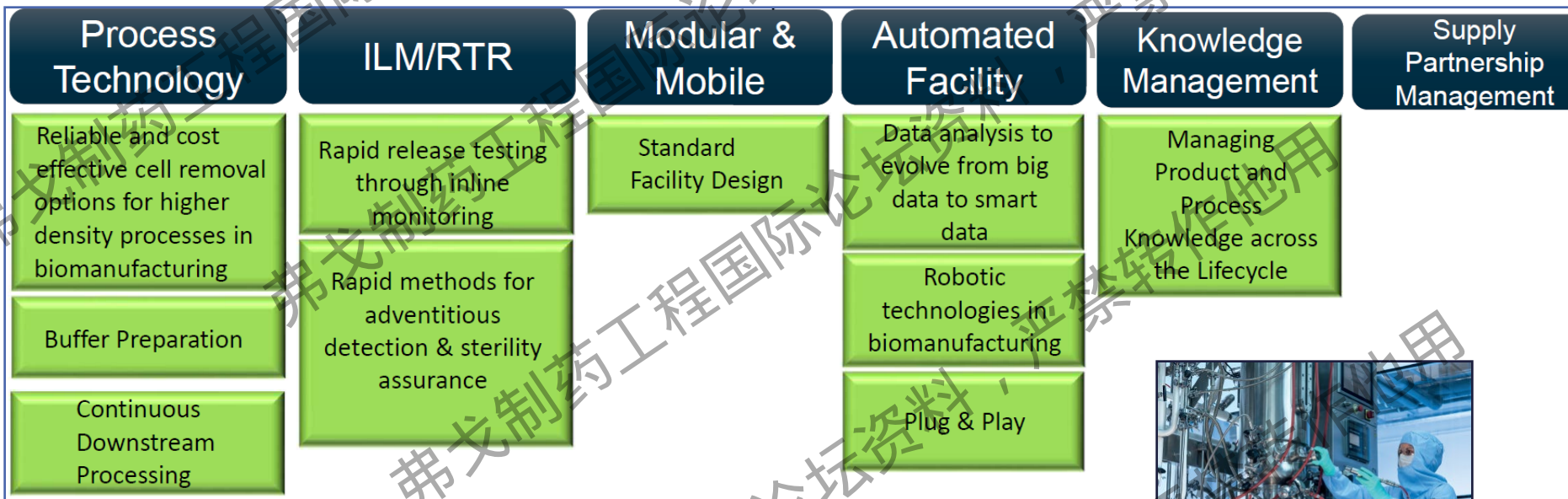
Supplier
Management

Regulatory
Harmonisation

Keep
workforce
capable

Multi-use and
flexible
facilities

生物制药的未来设施 的实践：体系



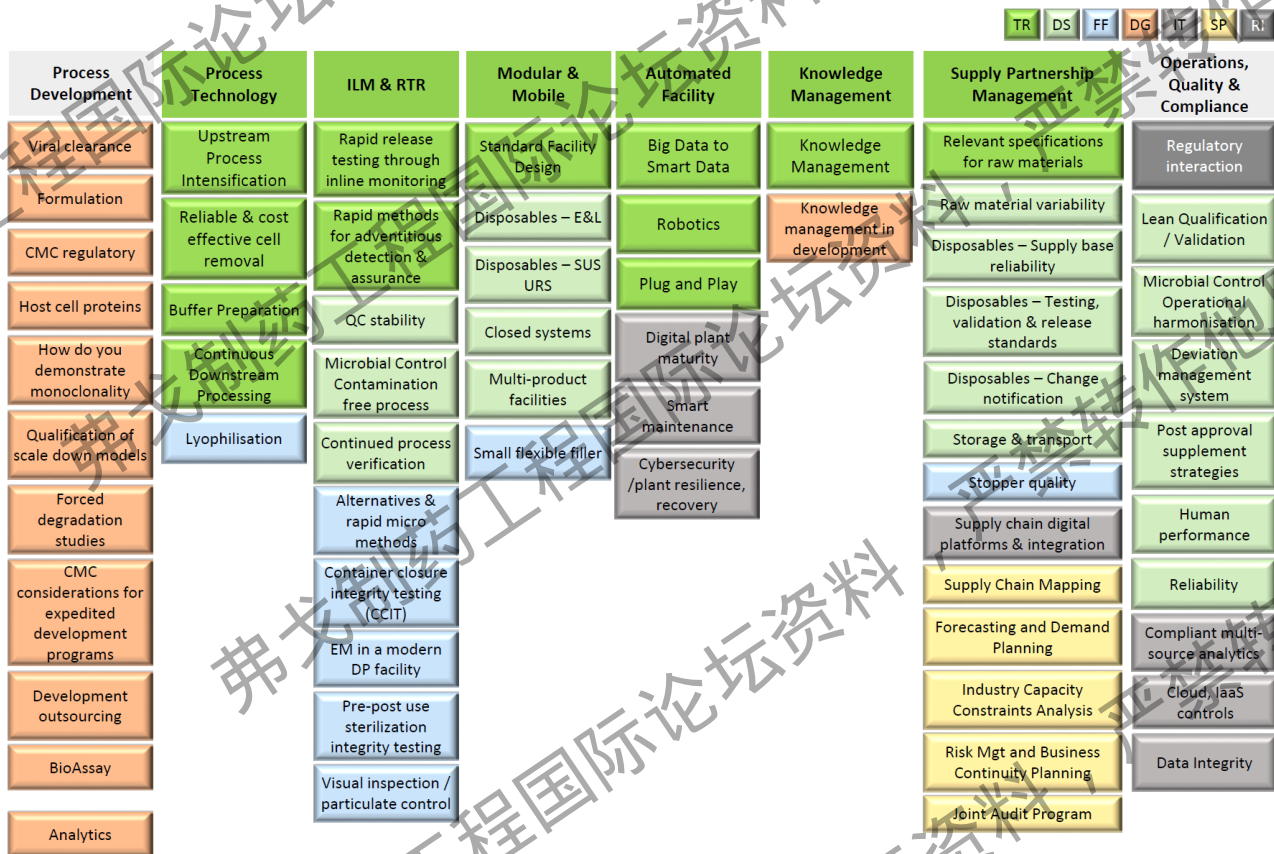
In-Line / Advanced Testing to support Bio-Manufacturing

Current State		
Category	What	Where
General	pH	QC Lab
	Osmolality	
	Color (visual)	
	Turbidity (visual)	
Quantity	Protein Conc by RI	
Identity	ICIEF & Binding Assay	
Purity/Impurities	UPLC-SEC	
	Non-Reducing CE-SDS	
	Imaging Capillary IEF	
Biological Activity	Binding Assays	
Safety	Bioburden (plates)	
	Endotoxin (turbidimetric)	
	In-Vitro Adventitious Virus	

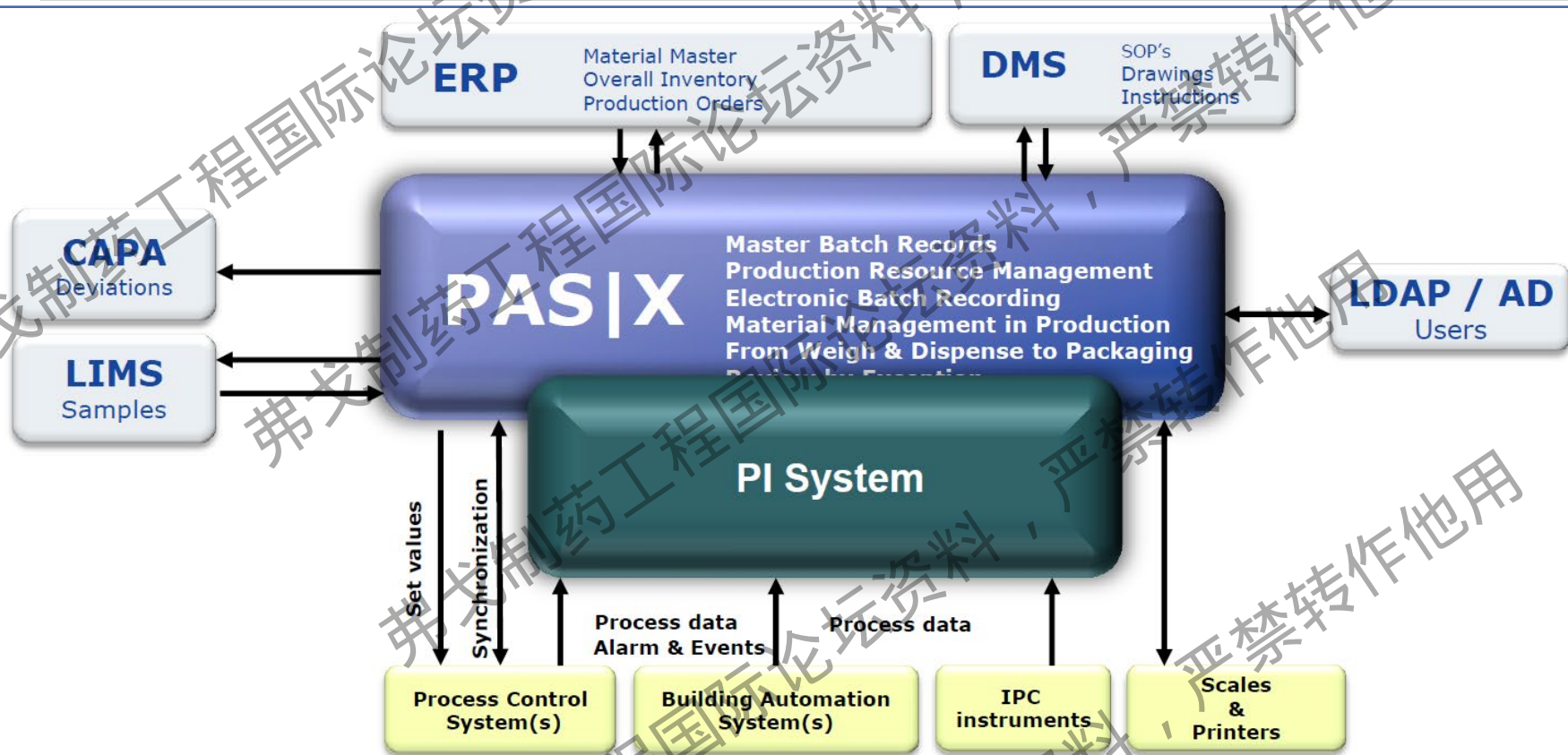


Future State		
Category	What	Where
General	Inline pH	In-line
	Inline Conductivity	
	Color by HunterLab	
	Turbidity Meter	
Quantity	Protein Conc by SoloVPE	At-line
Identity	Dot Blot ID	
Purity/Impurities	UPLC SEC	
Safety	Endotoxin by EndoSafe	
Purity/Impurities	LC/MS Peptide Map	High Tech Lab
Biological Activity	Binding w/ Automation	
Safety	Bioburden by GrowthDirect	
	NGS for Adventitious Virus	

生物制药的未来设施 的实践：工艺、知识管理、供应链



数字化转型的系统搭配



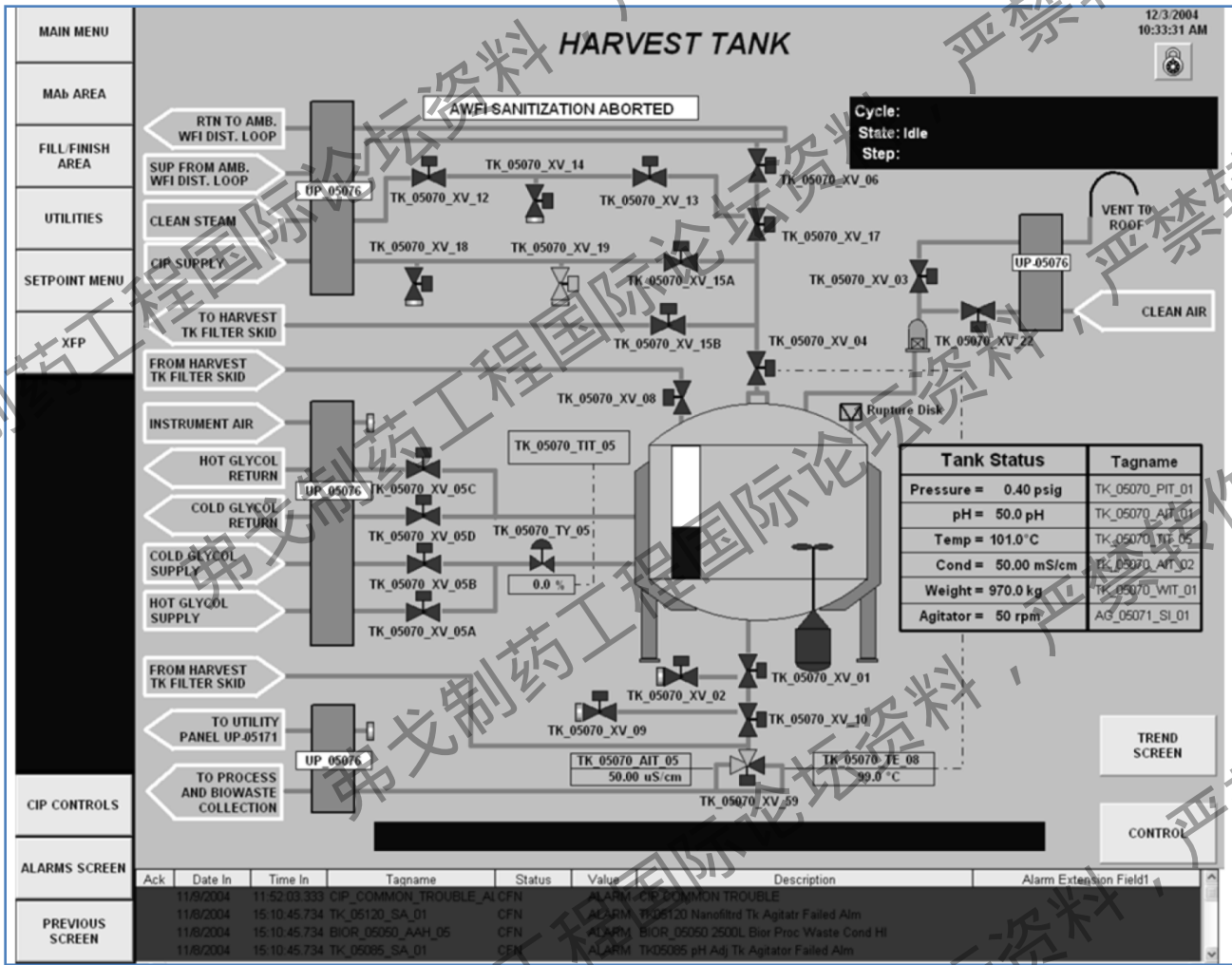


PC based Operator Interfaces

- *PC – 1981 IBM*
- *Late 80's – Window to the PLC*
- *Replaced pilot lights, pushbuttons and selector switches*
- *1990's DCS systems – Hybrid*



**自动化
系统的
演变**



自动化系统的演变

Automation Advancements – S88

(ISA 88, Batch Control)

自动化
系统的
演变

Problem – Every batch control system programmed separately.

Solution - S88, shorthand for **ANSI/ISA-88**, a standard addressing batch process control. A design philosophy for describing equipment and procedures. It was approved by ISA in 1995. It was adopted by the IEC in 1997 as IEC 61512-1.

S88 provides a consistent set of standards and terminology for batch control and defines the physical model, procedures, and recipes.

自动化系统的演变

Automation Advancements – Server Technology

- Servers have dedicated functionality such as web servers, print servers, domain servers, database servers
- Servers have a faster CPU, and often, redundant hard drives, power supplies and network connections for disaster recovery.



Automation Advancements – MES

Manufacturing Execution System - a control system for managing and monitoring work in process on a factory floor to improve productivity and reduce cycle-time. Often integrated with ERP software.

Typically Include

- Scheduling
- Security Basics
- Equipment Tracking
- Materials Management
- Inventory Management
- Recipe Authoring
- Order Management
- Weigh and Dispense
- Electronic Batch Records
- Electronic Signatures
- Genealogy and Traceability

Software

- Werum
- Syncade
- Elan
- PMX
- Simatic IT
- Plant Apps

生产管理
系统的
开发

Portable Wireless Workstations



移动式
工艺
控制站

生物制药的未来

Biotech Manufacturing: The Future

- **Smaller, flexible, multiproduct, multiplatform facilities.**
- **Entirely disposable or hybrid systems following standards for interconnection.**
- **Current batch manufacturing will shift toward continuous manufacturing like other matured processing industries (oil, commodity chemicals, paper).**

Business / MFG Intelligence

BI / MI 秀才不出门



