



STRATEGIC
PANEL
& Committees

Introduction to Holistic Peer Comparison Reporting

Change History

Version Number	Date of Issue	Reason for Change	Sections affected
1	28 October 2021	First publication	
2	19 November 2021	Amended date reports will be issued. Weighting rationale added.	Your Holistic Report. Appendix 1 and 2.
3	22 February 2022	Removed weightings. Removed Retailer R1, R3 & RF % Actual Reads measures. Amended Wholesaler MPS measure.	How am I benchmarked against my peers? I am the retailer, what will I be measured on? Appendix 1 and 2.
4	18 March 2022	Amendments made to reflect revised format of holistic reports	How am I benchmarked against my peers? I am the retailer, what will I be measured on? I am the wholesaler, what will I be measured on?
5	21 June 2022	Added complaints measures for Retailers. Removed section on timeline for holistic reporting. Amended location and publication of reports.	How am I benchmarked against my peers? I am the retailer, what will I be measured on? I am the wholesaler, what will I be measured on? Your holistic report What is the timeline for holistic reporting? Appendix 1
6	22 February 2023	Adjustments made to the performance measures included in the OPS metrics	I am the wholesaler, what will I be measured on? Appendix 2
7	30 October 2023	Further adjustments made to the performance measures included in the OPS metrics	I am the wholesaler, what will I be measured on? Appendix 2



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What are Holistic Peer Comparison Reports

One of the two priorities of the Market Performance Committee (MPC), is to 'Proactively monitor market and individual trading parties' performance and, using appropriate indicators, make decisions to escalate poor performance and hold parties to account for improving their performance'.

To support this priority, the MPC set itself the objective to develop and utilise a holistic set of measures beyond Market Performance Standards (MPS) and Operational Performance Standards (OPS).

Holistic reporting assesses retailer and wholesaler performance across a variety of performance indicators, drawn from Market and Operational Performance Standards and Additional Performance Indicators (APIs).

This will enable the MPC to prioritise rectification based on areas of poor performance which have the greatest detriment to customers.

Why Holistic Peer Comparison Reports?

Adherence to the current set of market and operational standards was not leading to the level of improvement needed in key areas such as data quality, consumption information or settlement accuracy.

Holistic reporting will support consideration of aggregate performance (and subsequent material improvement action), rather than focusing on specific process steps under individual performance measures.

Task based standards alone do not provide a true representation of market performance which should be aligned to customer outcomes. This was evident in the year preceding the introduction of holistic reporting, during which time we observed the following:

- While performance against MPS remained level, the percentage of actual reads supporting settlement dropped and some retailers saw a rise in meters becoming unread for more than 12 months
- Current measures did not consider Data Quality or Vacant with Consumption
- Accountability for some standards may have been misaligned, for example where pre-market meter data issues impacted a retailer's ability to read a meter.

How am I benchmarked against my peers?

Holistic reports are a means of monitoring and comparing retailers and wholesalers across a range of measures, to provide a holistic view of trading party performance.

The following indicators are utilised to determine performance and derive peer comparison:

- Specific key and / or customer driven MPS
- Specific key and / or customer driven OPS
- Additional Performance Indicators (Data Quality, Long Unread Meters & Vacancy Reporting)
- Measure of Experience Surveys

New APIs were required for some aspects of the reporting. Development of these APIs was identified in the [Market Performance Operating Plan \(MPOP\) 2021/22](#) and they have been endorsed by the MPC.

Changes have been made to the format of the holistic report following trading party feedback and discussion and agreement with the MPC (17 March 2022, MPC 59). Subsequently, the inclusion of two additional measures for Retailers in relation to complaints was agreed by the MPC (18 May 2022, MPC 61). These new measures apply only to Retailers with more than 5,000 SPIDs. To establish an overall ranking, each trading party is assigned a rank for each measure based on its percentage score. These ranks are added together to create a Total Rank score (the lower the number the better the position) allowing an overall rank to be applied. This gives an overall view of each trading party's performance across several areas, which allows for a holistic assessment of their performance. Colours are assigned based on the original quartile methodology (green representing the highest performing quartile; red representing the lowest).

This format of the report addresses the following requirements which were highlighted by TP feedback:

- It enables a trading party to understand the proximity of its nearest competitors who share the same quartile
- It provides the trading party with the level of performance needed to move up a quartile or up the rankings
- It helps the MPC identify areas where market performance is lower than expected

Trading party performance will be assessed by the Market Performance Committee (MPC) to provide market insights and decide whether any rectification measures should be put in place.

The peer comparison tables were first made available to trading parties on their SharePoint sites. The reports have been refined and are now available on the Power BI platform within MOSL's Portal site under "Market Performance". The same reports without the interactive functionality are also published on MOSL's website under "Holistic Reporting" to support continued improvement and transparent reporting. Please see section on "Your Holistic Report" for further information on reporting.

Market and Operational Performance Standards will remain in place.

I am a Retailer, what will I be measured on?

There are 6 retailer indicators. Each indicator for the retailer holistic reports is explained below:

- 1. Retailer Meter Reading:** The timely completion of meter reading tasks, comprising of KPIs for transfer reads and cyclic reads (MPS 16, 17, 18 and 19).
- 2. Long Unread Meters (LUMs):** A Long Unread Meter is a meter which has not been read for more than 12 months (but which has been read since the market opened).
- 3. Vacancy with Consumption:** Vacant premises where the level of consumption is above the minimum level of consumption that can be accurately measured for any given meter size (known as the Q1 value).
- 4. Data Quality:** Occupied premises where customer name data is non-specific.
- 5. Customer Complaints to the Retailer:** the number of complaints made to retailers per 10,000 SPIDs in the latest available quarter
- 6. Customer Complaints escalated to Consumer Council for Water (CCW):** the number of complaints made to CCW per 10,000 SPIDs in the latest available quarter

The complaints measures apply only to Retailers with more than 5,000 SPIDs. The data for the complaints measures is for the latest available quarter provided to MOSL by CCW.

The Holistic peer comparison table presents Retailer performance against each individual indicator.

In the previous version of the holistic reports

- The quartile scoring (4 representing the highest quartile; 1 representing the lowest) was replaced by the percentage scores for the measure
- The percentage scoring for Data Quality, LUM and Vacancy with Consumption was "inverted". Previously, scoring had represented the percentage of premises or meters that failed to meet

the reporting criteria: a lower percentage indicated improved performance. These percentages have now been subtracted from 100% to demonstrate how many premises or meters achieved the standards set by the reporting criteria e.g.

- The previous method of reporting data quality might report that 2% of premises are identified as having data quality issues (issues with the customer name and banner name)
- The Version 2 method for the same scenario will assess the same data but would report on the majority volume i.e. that issues with customer name and banner name could not be detected in 98% of premises.
- The ranking for each retailer is applied to each metric and these ranks are then used to create a Total rank score (where the lower the number the better the position) allowing an overall ranking to be applied.
- In addition, an average percent score is calculated so that where positions are tied (e.g. joint 3rd with a score of 18) the retailer with the higher average percent score is placed above the other retailer

This format has been retained in the latest version of the holistic report.

The Retailer performance tables are split by:

- Retailer with over 5000 SPIDS
- Retailer with less than 5000 SPIDS
- Self-Supply and NAV Retailers

For more detailed information on your performance against these individual measures please refer to the Market Performance dashboards set out below:

- Retailer Meter Reading: MPS Dashboard
- Long Unread Meters: Metering Dashboard
- Vacancy with Consumption: Vacancy Dashboard
- Data Quality: Data Quality Dashboard

The first two dashboards are located on the MOSL website at [All Market Charts \(mosl.co.uk\)](https://portal.mosl.co.uk) with the others located within the MOSL Portal at <https://portal.mosl.co.uk/Portal/>

For a detailed overview of each of the measures including rationale and definition see Appendix 1.

I am a Wholesaler, what will I be measured on?

There are 9 wholesaler indicators. Each indicator for the wholesaler holistic reports is explained below:

- 1. Long Term Vacancy (LTV) %:** A LTV is defined as a premises vacant for 6 or more consecutive years with no identifiable consumption, including unmetered premises, metered premises with reads and zero consumption and unread metered premises.
- 2. Legacy Long Unread Meters %:** LLUM is defined as a meter that had not been read since market opening, within an occupied or vacant premise.
- 3. OPS Metering and Verification:** Established Key Performance Indicators which capture essential source data on Metering (OPS B1a, B3a, B3b and B5a and Bilateral Hub processes B1-2, B1-4, B3-2, B3-3 and B5-1) and Verification (OPS C1a, C1b, C3a and C4a and Bilateral Hub processes C1-1, C3-1 and C4-1).
- 4. OPS Customer Service and Disconnection:** Established Key Performance Indicators which capture essential source data on Customer Service (OPS F5a, F5b, H1a and Bilateral Hub processes F5-2 and H1-1) and Disconnection (OPS I1a and I1b) standards.
- 5. MPS New Connections and Meter reads:** Established Key Performance Indicators which capture essential source data on new connections (MPS 3 and 5) and meter reads and submission (MPS 7, 12, 13 and 14).
- 6. Unique Property Reference Number (UPRN) Completeness:** Number of premises which have no UPRN data.
- 7. Valuation Office Agency (VOA) Reference Number Completeness:** Number of premises which have no VOA data.
- 8. GIS data issues:** There are three main areas of issues for GIS coordinates that strongly indicate inaccurate/erroneous data
 - The coordinates are far from postcode centre
 - The coordinates map to the exact centre of the postcode
 - The coordinates are an exact match with those provided for at least twenty other meters in CMOS
- 9. R-MeX:** The Retailer Measure of Experience (R-MeX) survey provides a quantitative measurement of wholesaler service to their retailer(s).
The R-MeX consists of eight questions covering topics such as engagement, communication and data quality, asking retailers to provide a score between 0-10 with the option to provide additional feedback via an open text field.

The MPS, OPS and R-MeX measures apply only to Wholesalers with more than 1,000 SPIDs.

The Holistic peer comparison table presents Wholesaler performance against each individual indicator.

In the previous version of the holistic report

- The quartile scoring (4 representing the highest quartile; 1 representing the lowest) was replaced by the percentage scores for the measure
- The percentage scoring for LTV, LLUM and GIS data issues was “inverted”. Previously, scoring has represented the percentage of premises or meters that failed to meet the reporting criteria: a lower percentage indicated improved performance. These percentages have now been subtracted from 100% to demonstrate how many premises or meters achieved the standards set by the reporting criteria e.g.
 - The previous method of reporting data quality might report that 10% of meters are identified as having GIS data issues (issues with the GIS co-ordinates)
 - The Version 2 method for the same scenario will assess the same data but would report on the majority volume i.e. that issues with GIS data could not be detected in 90% of meters.
- The ranking for each wholesaler is applied to each metric and these ranks are then used to create a Total rank score (where the lower the number the better the position) allowing an overall ranking to be applied.
- In addition, an average percent score is calculated so that where positions are tied (e.g. joint 2nd with a score of 43) the wholesaler with the higher average percent score is placed above the other retailer

This format has been retained in the latest version of the holistic report.

The wholesaler performance tables are split by:

- Wholesalers with over 1000 SPIDS
- Wholesalers with less than 1000 SPIDS and NAVs

For more detailed information on your performance against these individual measures please refer to the Market Performance dashboards set out below:

- Long Term Vacancy: Vacancy Dashboard
- Long Unread Meters: Metering Dashboard
- OPS Metering and Verification: OPS Dashboard
- OPS Customer Service and Disconnection: OPS Dashboard

- MPS New Connections and Meter reads: MPS Dashboard
- UPRN Completeness, VOA Completeness & GIS data issues: Data Quality Dashboard
- RMEX: <https://mosl.co.uk/services/market-assurance/performance-and-risk/r-mex>

The metering, MPS, OPS and R-MeX dashboards are located on the MOSL website at [All Market Charts \(mosl.co.uk\)](#) with the others located within the MOSL Portal at <https://portal.mosl.co.uk/Portal/>

For a detailed overview of each of the measures including rationale and definition see Appendix 2.

Your Holistic Report

Your Holistic peer comparison report gives you an overview of your performance across all the above measures. These reports have been produced, developed, and distributed to trading parties via their SharePoint folders over the last 6 months. MOSL has now established these reports on its Portal (<https://portal.mosl.co.uk/Portal/>) and they are located under “Market Performance”. These reports have the same functionality as other Portal reports, allowing the user to configure views and date ranges and to export summarized data.

The same reports, without the interactive functionality, are also available on the holistic reporting section (<https://mosl.co.uk/services/market-assurance/performance-and-risk/holistic-reporting>) of the MOSL website.

We will aim to update the holistic report by the 5th business day each month.

If you have any questions regarding holistic reports, please email performance@mosl.co.uk.

Appendix 1: Retailer Holistic Measures

Indicator	Rationale	Definition	Measure
1. Retailer Meter Reading	Poor performance in relation to taking and submitting reads within defined time parameters may impact the ability to provide accurate and timely bills for the customer.	The timely completion of meter reading tasks, comprising of KPIs for transfer reads and cyclic reads (MPS 16, 17, 18 and 19), as set out in Code Subsidiary Document 0002 (CSD0002).	This is measured by calculating the sum of all tasks completed on time over the latest available three-month period the 4 standards as a percentage of all tasks completed over that 3-month period for the 4 standards.
2. Long Unread Meters (LUMs)	Potential for aged estimates and possible retailer and customer billing issues associated with meters that have not been read for a long time.	A Long Unread Meter is a meter which has not been read for more than 12 months (but which has been read since the market opened).	The LUM % is calculated as the number of those meters, within both vacant and occupied premises, which have not been read for more than 12 months, as a percentage of all meters managed by the retailer.
3. Vacancy with Consumption	This represents one of two issues, customer service and water efficiency, the measure identifies a level of consumption that suggests either occupancy by an unidentified customer or a leak which needs repairing.	This measure captures cases where vacant sites may be occupied or where there may be leakage.	It is calculated as the number of premises which are listed as vacant which have recorded consumption (in excess of the Q1 value according to standard ISO 4064-1) during the period of vacancy as a percentage of all premises registered to the retailer.
4. Data Quality	There is an obligation to maintain this data on CMOS, but lack of customer name also impacts tendering, switching and could impact wholesaler's ability to contact customers during emergencies such as interruption of supply.	Occupied premises where customer name data is non-specific.	Data quality is calculated as the number of occupied premises who have no customer name or banner name on CMOS as a percentage of all customers managed by the retailer. The measure represents the DQ of the TP on the month of the report.
5. Customer Complaints to the Retailer ¹	The MPF aims to drive positive customer outcomes. Low levels of complaints help to confirm this aim is being achieved.	The number of written complaints received for every 10,000 SPIDs managed by the retailer	This is measured by taking the total written complaints to the retailer and dividing them by the total supply points managed by the retailer and multiplying by 10,000
6. Customer Complaints to CCW ²	The MPF aims to drive positive customer outcomes. Low levels of complaints help to confirm this aim is being achieved.	The number of complaints for every 10,000 SPIDs managed by the retailer that are escalated to CCW	This is measured by taking the total complaints escalated to CCW and dividing them by the total supply points managed by the retailer and multiplying by 10,000

¹ Applies only to retailers with more than 5,000 SPIDs. For further information see CCW website

² Applies only to retailers with more than 5,000 SPIDs. For further information see CCW website

Appendix 2: Wholesaler Holistic Measures

Indicator	Rationale	Definition	Measure
1. Long Term Vacancy (LTV) %	Premises vacant 6+ years, with no consumption, could indicate that they should no longer be in the market or data quality issues. Rectification will ensure eligible premises in the market and improve customer data accuracy and billing.	A LTV is defined as a premises vacant for 6 or more consecutive years with no identifiable consumption, including unmetered premises, metered premises with reads and zero consumption and unread metered premises.	The number of Long Term Vacant (LTV) premises as a percentage of all premises by Wholesaler. NB: MOSL are researching ways in which TPs may be able to confirm assured vacants with the potential aim of amending this measure to exclude verified LTVs.
2. Legacy Long Unread Meters %	If a meter has been unread prior to market opening, there may be a core asset data issue. Rectification will drive accurate consumption and customer billing or identify supplies that should no longer be in the market.	LLUM is defined as a meter that had not been read since market opening, within an occupied or vacant premise.	Number of Legacy Long Unread meters (LLUMs) as a % of all meters for which the wholesaler is responsible.
3. OPS Metering and Verification ³	These are recognised as key processes impacting customer outcomes, which if not executed may prevent meters from being read and customers being accurately billed or billed at all.	Established Key Performance Indicators which capture essential source data on Metering (OPS B1a, B3a, B3b, B5a and B5-1 process in the Bilaterals hub) and Verification (OPS C1a, C1b, C3a, C4a and C1-1 process in the Bilaterals hub), as set out in Code Subsidiary Document 0002 (CSD0002).	This is measured by calculating the sum of all tasks completed on time over the latest available 3-month period for the standards as a percentage of all tasks completed over that 3-month period for the standards.
4. OPS Customer Service and Disconnection ⁴	These are recognised as key processes impacting customer outcomes, which if not executed may prevent disconnection or highlight customer service issues.	Established Key Performance Indicators which capture essential source data on Customer Service (OPS F5a, F5b, H1a and F5-2 process in the Bilaterals hub) and Disconnection (OPS I1a and I1b) standards, as set out in Code Subsidiary Document 0002 (CSD0002).	This is measured by calculating the sum of all tasks completed on time over the latest available 3-month period for the standards as a percentage of all tasks completed over that 3-month period for the standards.
5. MPS New Connections and Meter reads ⁵	These are recognised as key processes affecting customer outcomes as they introduce new customers to the retail market and impact timely and accurate billing.	Established Key Performance Indicators which capture essential source data on new connections (MPS 3 and 5) and meter reads and submission (MPS 7, 12, 13 and 14), as set out in Code Subsidiary Document 0002 (CSD0002).	This is measured by calculating the sum of all tasks completed on time over the latest available 3-month period the 6 standards as a percentage of all tasks completed over that 3-month period for the 6 standards.
6. UPRN Completeness	UPRN data provides significant value to the market (verification of eligibility, occupancy, customer and premises management) and incompleteness of this data item creates unnecessary costs	Number of premises which have no UPRN data.	Number of premises which have no UPRN data expressed as a percentage of all premises within the wholesaler's estate. The measure represents the UPRN completeness % of the TP on the month of the most recently available report.

³ Applies only to wholesalers with more than 1,000 SPIDs

⁴ Applies only to wholesalers with more than 1,000 SPIDs

⁵ Applies only to wholesalers with more than 1,000 SPIDs

	to retailers and operational inefficiency.		
7.VOA Completeness	VOA data provides significant value to the market (verification of eligibility, occupancy, customer and premises management) incompleteness of this data item creates unnecessary costs to retailers and operational inefficiency.	Number of premises which have no VOA data.	Number of premises which have no VOA data expressed as a percentage of all premises within the wholesaler's estate. The measure represents the VOA reference completeness % of the TP on the month of the most recently available report
8.GIS data issues	The API was introduced because, based on our analysis, and the Data Quality RFI, we estimated the annual lower bound resource cost to the market of poor-quality meter location data to be approximately £4.2m.	There are three main areas of issues for GIS coordinates that strongly indicate inaccurate/erroneous data <ul style="list-style-type: none"> • The coordinates are far from postcode centre • The coordinates map to the exact centre of the postcode • The coordinates are an exact match with those provided for at least twenty other meters in CMOS. 	Number of meters which present erroneous GIS data as a % of all meters for which the wholesaler is responsible. The measure represents the GIS issues % of the TP on the month of the most recently available report.
9.R-MeX ⁶	This qualitative reporting from retailers will confirm the delivery of improved outcomes by the wholesalers and will help drive the reduction of some market frictions.	The Retailer Measure of Experience (R-MeX) survey provides a quantitative measurement of wholesaler service to their retailer(s). The R-MeX consists of eight questions covering topics such as engagement, communication and data quality, asking retailers to provide a score between 0-10 with the option to provide additional feedback via an open text field.	The R-MeX overall score by wholesaler, as reported in the league table for the latest R-MeX survey

⁶ Applies only to wholesalers with more than 1,000 SPIDs