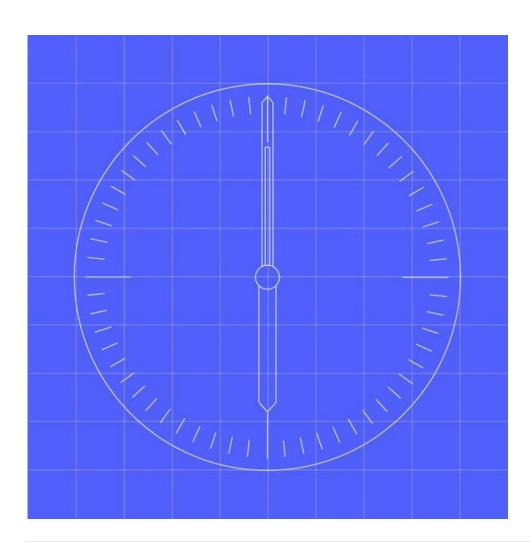


Load Shaping Service: Methodology Statement

Version 5.3 – 15th August 2024



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Version 5.3 15 August 2024

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Section A Background

- 1.1 This document sets out the Load Shaping Service (LSS) requirements for creating Load Shapes and associated Load Shape Totals. The Load Shapes are used by the Data Services and MDS for calculation of UTC Period level data where UTC Period Level Data is unavailable, invalid or missing.
- 1.2 A Load Shape is a set of daily average consumption or export data for each UTC Period for a Categorisation of Metering Systems in the population.
- 1.3 The following processes are covered in this document:
 - Identifying Load Shape Categories (LSC) using Industry Standing Data (ISD);
 - Counting the MPAN data associated with each LSC;
 - Calculating the Load Shape associated with each LSC;
 - Calculating the Load Shape Total for each LSC;
 - Calculating the Off-peak total associated with each LSC;
 - Calculating the Peak total associated with each LSC;
 - Calculating the 7 day Rolling Total for each LSC;
 - Calculating the 7 Day Rolling Off-peak Total For each LSC;
 - Calculating the 7 Day Rolling Peak Total For each LSC;
 - Calculating the default Load Shapes where the available data for an LSC is less than the configured De-minimis Data Count value defined in ISD;
 - Calculating back-stop Load shapes where no data is available for LSCs in any GSP Group; and
 - LSS post calculation validation requirements.
- 1.4 This document also sets out the how to identify Load Shape Categories required for the LSS Process.
- 1.5 The term UTC Period Level Consumption Data refers to consumption or export data that is of UTC Period Granularity. LSS must have flexibility as to the duration of a UTC Period. The LSS must be able to process varying durations of one UTC Period. The UTC Period will not change in a UTC date and there will not be different UTC durations per Load Shape Category. All services should, where possible, build in the ability to configure the settlement period duration during their solution design, in order to support any future move to a different settlement period duration

Section B General Requirements

2. LSS General validation requirements

2.1 The LSS shall validate all UTC Period Level Consumption data following receipt using the associated Registration Data. The data shall be validated as follows:

Test/Condition	
s Data Service [S1.SenderID] Appointed for Midday on the UTC Settlement Date [DI-101]	ECS1001 - Data Service [S1.SenderID] not appointed for Settlement Date [DI-101]
If Event Code [DI-999] = [ActivePower], then MQID (DI-052) must equal "AI" or" AE"	ECS1002 - MQID [DI-052] in Settlement End Date/Time [DI-082] is not valid for Event Type [DI- 999]
If SP End Date/Time [DI-082] < MDS Run Date (RF) as specified for the SP End Date/Time [DI-082] in the Master Settlement Table in ISD	ECS1003 - SP End Date/Time [DI-082] is older than/prior to "MDS Run Date (RF) [ISD.RunDate- RFDate]"
If SP End Date/Time [DI-082] >= Connection Type Eff From [DI-016]	ECS1013 - SP End Date/Type [DI-082] is prior to Connection Type Eff From [DI-016]
If SP Duration (DI-081) = "Setllement Period Duration ISD" for Settlement Date [DI-082]	ECS1004 - Settlement Period Duration [DI-081] invalid

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*SP End Date/Time (DI-082) invalid for Settlement Period Duration (DI-081)	ECS1005 - SP End Date/Time [DI-082] is invalid for Settlement Period Duration [DI-081]
*SP End Date/Time (DI-082) duplicated with SP in same message	ESC1006 - SP End Date/Time [DI-082] duplicated with SP in same message
*SP End Date/Time (DI-082) overlaps with SP in same message	ESC1007 - SP End Date/Time [DI-082] overlaps with SP in same message
If [MDS.MPAN_Status] = "De-Energised" for SP End Date/Time and the Settlement Period Quality Indicator ≠ A, A1, A2, A3, AAE1, AAE2, AAE3, E2 or E6	ECS1008 - SP End Date/Time [DI-082] contains non-actual consumption for ECS De-Energised MPAN
If [ECS_MPAN_Status] = 'Disconnected' for SP End Date/Time	ECS1009 - SP End Date/Time [DI-082] conflicts with ECS MPAN Status
SP Consumption (DI-147) must be Zero if Estimation Code is type 'ZE','ZE1', 'ZE2' or 'ZE3'	ECS1011 - SP Consumption [DI-147] must be zero if Estimation Code is type 'ZE', 'ZE1', 'ZE2' or 'ZE3'
SP Consumption (DI-147) is greater than [MDS_MaxLimit]	ECS1012 - SP Consumption [DI-147] is greater than ECS Maximum of [ESC_MAX]

Actual UTC Period Level Consumption Data and Estimates based on Actual Data

Actual UTC Period Level Consumption Data is valid period data retrieved directly from the Meter this data will be flagged A, A1, A2, A3, AAE1, AAE2 or AAE3. Some data is estimated using actual Register Reads or Daily Advances or Daily Consumption from the Meter which is then applied to a Load Shape, this data is flagged either E2 or E6. The Load Shaping Service only processes Actual UTC Period Level Consumption Data.

The Load Shaping Service shall:

- Identify the UTC date for each Load Shaping Run using the Load Shaping Calendar set out in ISD;
- Only access the most recent UTC Period Level Data for each MPAN and UTC date, where more than one set
 of data exists;
- Access the 'A' flagged (A, A1, A2, A3, AAE1, AAE2 and AAE3) UTC Period Level Consumption Data for the UTC date to be processed;
- Access the associated Registration data for each MPAN that has 'A' (A, A1, A2, A3, AAE1, AAE2 and AAE3) flagged UTC Period Level Data for the UTC date to be processed; and
- All Load Shape value will be in kWh and rounded to 3 decimal places when output
- 2.2 When processing the data the LSS shall address each UTC Period for a given UTC Date independently and be cognisant of any in day changes to the Registration data identified by the date-time of the 'Effective from Dates' (EFDs), e.g. a change in Domestic Premise Indicator. Where in day registration data changes have occurred they will be applied from the start of the subsequent UTC date.
- 2.3 All validation failures should be reported in a timely manner on the I/F-014 and PUB/014 using the Self Describing Error Code above.
 - 3. Identifying Load Shape Categories (LSC) using Industry Standing Data (ISD)
- 3.1 The LSS shall use the Registration data provided for each MPAN and the LSC set out in the source of the published ISD applicable for the UTC Date being processed. The required Data Items need to be configurable. Initially the following Data Items will be required to identify the appropriate Load Shape Category:

Data Item Id	Data Item Name	Definition

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DI-050	Market Segment Indicator	An enumeration of Smart/Advanced/Unmetered.
DI-037	GSP Group ID	Identifies the distinct grid supply point group (physical region of the country) where the metering point is located.
DI-030	Domestic Premise Indicator	A flag that indicates if the MPAN of the registration appointment is used to identify a domestic premise.
DI-052	Measurement Quantity ID	Identifies UTC Period if the data is Active Import (AI) or Active Export (AE). The Measurement Quantity Table in ISD maps Measurement Quantity ID to the Direction of Flow Indicator which matches the Registration data item.
DI-015	Connection Type Indicator	Whole Current (W), Low Voltage Current Transformer (L), High Voltage Current Transformer (H) or Extra High Voltage Current Transformer (E)

- 3.2 The Non-smart Switched Load Profile Class is not used for the production of Load Shapes other than identifying the periods that are totalised in the Load Shape totals. These identifiers are used by Smart Data Services to identify the Off-Peak/Peak periods for use the SDS estimation processes The ISD also defines the Off-peak period (and hence the Peak period) for use in the calculation of the Peak and Off-Peak Load Shape Totals for LSCs that require these totals to be calculated.
- 3.3 An illustration of the data in this ISD table is shown in Appendix 1 (the actual data items in the table are set out in the ISD specification).

2A. Load Shape Totals definition using Industry Standing Data (ISD)

The LSS shall use the Registration data provided for each MPAN and the LSC set out in ISD. The following Load Shape totals will need to be calculated for each LSC. Calculation methods are covered in Section C.

Load Shape Total	Description
Load shape total	The sum of all LS Period Values for the UTC Date.
Load shape peak total	The sum of LS Period Values for UTC times (07:00 to 00:00) or (00:00 to 00:30 and 07:30 to 00:00) as defined in ISD
Load shape off-peak total	For Smart Segment Metering Systems the sum of LS Period Values for UTC times (00:00 to 07:00) or (00:30 to 07:30) as defined in ISD
Load shape 7 day rolling total	The sum of the Load Shape Total defined above and the Load Shape Total for the past 6 UTC Dates.
Load shape 7 day rolling peak total	For Smart Segment Metering Systems the sum of the Load Shape Peak Total defined above and the Load Shape Peak Total for the past 6 UTC Dates.
Load shape 7 day rolling off-peak total	For Smart Segment Metering Systems the sum of the Load Shape Off-Peak Total defined above and the Load Shape Off-Peak Total for the past 6 UTC Dates.
Load Shape Rolling Annual Total	The sum of the Load Shape Total defined above and the Load Shape Total for the past 364 UTC Dates.

Identifiers used in this Method Statement

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The following Identifiers are used in this document:

Identifier	Data item
С	Load Shape Category
D	UTC Date
E	Previous UTC date with the same day type as UTC date D
Н	GSP Group
j	UTC Period
k	MPAN
U	A UTC Date

Where identifiers are in italics these are new MHHS Identifiers and do not have the same meaning as those set out in: https://www.elexon.co.uk/documents/bsc-codes/bsc-sections/bsc-section-x-2-technical-glossary/

Section C Load Shaping Methods

All registration, ISD and consumption data will be provided in a standard time format ISO8601.

Selecting data for a UTC date and calculating totals

When selecting data for a UTC date the LSS shall ensure the 'Effective to' datetime logic is used to identify the correct data for UTC Date "D". For example under MHHS the first period would have a UTC datetime 'effective to' 00:30. The last period would have a have a UTC datetime 'effective to' 00:00 even though the 'date' part of the datetime will be for the following day. The same logic must be used when calculating Load Shape Totals.

The Load Shaping Methods are set out below for each Load Shaping Run for each LSC defined in ISD

- 4. Counting the MPAN data associated with each LSC
 - 4.1 The LSS must use Registration Data, together with the Load Shape Categories from ISD, to allocate each MPAN 'k' to a Load Shape Category so the number of MPANs with UTC Period Level Data in each Load Shape Category for each UTC Period can be derived.

Method: For the UTC Date (*D*) and each UTC Period (*j*) and LSC (C) the LSS must count the number of UTC Period Level Data (UTCP_{Dj}) with actual (A Flagged) meter data as follows:

LSCCOUNT_{DjC} = Count (UTCP_{kDjC}) across MPANs 'k'

- 5. LSS Identifies LSC UTC Periods for a default calculation
- Where the count is less than the De-minimis Data Count value set out in ISD, the Load Shape Period Value (LSPV $_{D/C}$) shall be identified for a default calculation, and the Load Shape LSPV $_{D/C}$ will be set to the Default Load Shape DLSPV $_{D/C}$.
- 5.2 Therefore:

 $\mathsf{LSPV}_{DjC} = \mathsf{DLSPV}_{DjC}$

6. Calculating the default Load Shapes for the smart Segment where available data for a LSC is less than the configured De-minimis Data Count value defined in ISD

6.1 Where the MPAN 'k' count for a Load Shape Category for a UTC Period is less than the De-minimis Data Count value the LSS shall calculate a default Load Shape for that UTC Period averaging UTC Period Level Data over all GSP Groups that have the same remaining Load Shape Category characteristics.

Method: For the UTC Date (D) and each UTC Period (I) and LSC (C) identified for a default the LSS must average the UTC Period Level Data with actual ('A' Flagged) for the set of all GSP Groups (H). The LS data (DLSPV D_{IC}) shall be calculated as follows:

LSCCOUNTN_{DjC} = Count(UTCP_{kHCDj}) across k = MPAN and H = GSP Group

If the De-minimis Data Count value for the defaulted LSC is still not met then the Back-stop calculation set out below (in 7) shall be applied.

$$DLS_{DJC} = \frac{\sum_{HK} UTCP_{kHDJC}}{LSCCOUNTN_{DJC}}$$

Where the GSP Group Set H is all the GSP Groups (from A to P) and Load Shape Category C has the same identifiers other than the GSP Group Identifier.

The DLSPV $_{DjC}$ shall be 'D' Flagged for that UTC Period (j).

For other Market Segments see Back-stop defaulting see below.

7. Calculating Back-stop Load shapes where no data is available for LSCs in any GSP Group

7.1 For each UTC Period where data count is less than the De-minimis Data Count values for the Load Shape Category across all GSP group, the LSS must default to the most recent Load Shape for the Day Type and UTC Period that is the same as the UTC Date being processed.

Method: For the UTC Date (D) and each UTC Period (J) and LSC (C) where LSCCOUNTND(C) is below the Deminimis Data Count value or zero the LSS shall set the LS data (DLSD(C) as follows:

 $DLSPV_{DjC} = LSPV_{EjC}$

where E is the previous UTC date with the same day type as UTC date D

- 7.2 The day type for each UTC date is defined in the Load Shaping Calendar.
- 7.3 The defaulted UTC Periods shall be 'E' Flagged for each UTC Period (j).

8. Calculating the Load Shape where no previous data is available when defaulting

- 8.1 If no data exists for at least one UTC Period for previous UTC date with the same Day Type as the UTC Date being processed the LSS must use value of 1 for all UTC Periods associated to the UTC Date.
- 8.2 If there is no LSPV_{EjC} for all UTC Periods j.

 $DLSPV_{DjC} = 1$

The defaulted UTC Periods shall be 'B' Flagged for each UTC Period (j).

9. Calculating the Load Shape associated with each LSC

9.1 The LSS must average Actual UTC Period Consumption and process data by UTC Period and Load Shape category so that Load Shapes can be created for the whole UTC date.

Method: For the each MPAN 'k' and UTC Date (D) and each UTC Period (i) and LSC (C) not identified for a default calculation the LSS must average the UTC Period Level data (UTCP) with actual (A Flagged) data, the LS data (LSPV D_{iC}) shall be calculated as follows:

$$LSPV_{DjC} = \frac{\sum_{k} UTCP_{kDjC}}{LSCCOUNT_{DjC}}$$

The LS_{DJC} shall be 'A' Flagged for the UTC Period (j).

The Load shape for the UTC date will be the set of $LSPV_{DJC}$ and any $DLSPV_{DJC}$ values calculated.

10. Calculating the Load Shape Total for each LSC

10.1 The LSS must sum all of the individual UTC Period averages, for the UTC date, so as to calculate a daily total for each load shape category. This daily total should be stored/published alongside the Load Shape Data.

Method: For the UTC Date (D) and LSC (C) the LSS must sum the Load Shape data (LSPV $_{D|C}$) including any default LS data (DLSPV $_{D|C}$) to calculate the (LS $_{-}$ TOT $_{DC}$) as follows:

$$LS_TOT_{DC} = \sum\nolimits_{i} LSPV_{DjC}$$

11. Calculating the Off-peak total associated with each LSC

11.1 Where defined for a Load Shape Category the LSS must sum all of the off-peak UTC Period averages, for the UTC Date, so as to calculate an off-peak daily total for each Load Shape Category. These off-peak totals should be stored/published alongside the Load Shape Data.

Method: For the UTC Date (D) and LSC (C) the LSS must sum the Load Shape data (LSPV $_{D/C}$) including any default LS data (DLS $_{D/C}$) to calculate the Load Shape Off-peak total (LS_OFF $_{D/C}$) as follows:

$$LS_OFF_{DC} = \sum\nolimits_{j} LSPV_{DjC}$$

Where j = UTC Periods covering (00:00-07:00) or (00:30-07:30) as defined for the LSC in the Load Shape Category Table in ISD.

12. Calculating the Peak total associated with each LSC

12.1 Where defined for a Load Shape Category the LSS shall calculate the sum all of the peak UTC Period averages, for the UTC Date, so as to calculate a peak daily total for each Load Shape Category. These peak totals should be stored/published alongside the Load Shape Data.

Method: For the UTC Date (D) and LSC (C) the LSS use the Load Shape Total data to calculate the Load Shape Peak total (LS_PEAK $_{DC}$) as follows:

$$LS_PEAK_{DC} = LS_TOT_{DC} - LS_OFF_{DC}$$

13. Calculating the 7 day Rolling Total for each LSC

13.1 For each LSS Category, the LSS must calculate a 7 day rolling total using the total for the UTC date plus the previous 6 UTC dates. This total should be stored and publish as part of the Load Shape Data.

Method: For the UTC Date (D) and LSC (C) the LSS use the Load Shape Total data to calculate the Load Shape Rolling 7 Day total (LS_ROLL_TOT $_{DC}$) as follows:

$$\mathsf{LS_ROLL_TOT}_{\mathit{DC}} = \sum\nolimits_{v=D-6}^{D} \mathsf{LS_TOT}_{\mathit{VC}}$$

Where V is a UTC date.

14. Calculating the 7 day Rolling Off-Peak Total for each applicable LSC

14.1 For each LS Category, where it is defined, the LSS must calculate a 7 day rolling Off-Peak total using the Off-Peak total for the UTC date plus the last 6 UTC dates. This total should be stored and publish as part of the Load Shape Data

Method: For the UTC Date (D) and LSC (C) the LSS use the Load Shape Total data to calculate the Load Shape Rolling 7 Day Rolling Off-peak total (LS_ROLL_OFF $_{DC}$) as follows:

$$LS_ROLL_OFF_{DC} = \sum\nolimits_{E=D-6}^{D} LS_OFF_{XC}$$

Where X is a UTC date

Where D = UTC date to D = UTC date-6

145 Calculating the 7 Day Rolling Peak Total for each LSC

15.1 For each LS Category, where it is defined, the LSS must calculate a 7 day rolling Peak total using the Peak total for the UTC date plus the last 6 UTC dates. This total should be stored and publish as part of the Load Shape Data

Method: For the UTC Date (D) and LSC (C) the LSS use the Load Shape Total data to calculate the Load Shape Rolling 7 Day Peak total (LS_ROLL_PEAK $_{DC}$) as follows:

$$LS_ROLL_PEAK_{DC} = \sum\nolimits_{X=D-6}^{D} LS_PEAK_{XC}$$

Where X is a UTC date

16. Calculating the Load Shape Rolling Annual Total for each LSC

16.1 For each LSS Category, the LSS must calculate the Load Shape Rolling Annual Total using the Load Shape Total for the UTC date plus the previous 364 UTC dates. This value should be stored and publish as part of the Load Shape Data.

Method: For the UTC Date (D) and LSC (C) the LSS use the Load Shape Total data to calculate the Load Shape Rolling Annual Total (LS_ROLL_ANN_TOT $_{DC}$) as follows:

$$\texttt{LS_ROLL_ANN_TOT}_{\mathit{DC}} = \sum\nolimits_{\mathit{V}=\mathit{D}-364}^{\mathit{D}} \texttt{LS_TOT}_{\mathit{VC}}$$

Where V is a UTC date.

17. Calculating the Load Shape Rolling Annual Total for each LSC where less than a year of Load Shape Daily Total data is available

Where there are fewer than 365 Load Shape Totals available, the LSS shall calculate the Load Shape Rolling Annual Total (LS_ROLL_ANN_TOT_{DC}) as follows:

LS_ROLL_ANN_TOT_{DC} =
$$(\sum_{P}^{\square} LS_{-}TOT_{DC})$$
 /Count (LS_TOT_{PC}) * 365

Where P is the period for which Load Shape Daily Totals (LS_TOT_{DC}) are available.

18. LSS Validates for processing errors

- 18.1 The LSS must validate that processing has completed correctly without error prior to the publishing of the LSS data and notifying to MDS. If validation fails an investigation into the cause of failure must be undertaken to correct the validation failure and the LSS calculations must be re-run. If no error is identified the data is assumed to be correct. For each UTC Period the LSS must validate that the Load Shape is within a configurable [x%] of the most recent Load Shape for the same Category and Day Type. If Validation fails it must default to the previous Day Type for that Load Shape category (default flag to be applied for each UTC Period). The defaulted UTC Periods shall be 'D' Flagged for each UTC Period (j).
- 18.2 The interfaces produced by LSS are covered in the Interface Specification Design Artefact.

Appendix 1: ISD Table: Load Shape Categories

The Load Shape Categories are set out in the published source of Industry Standing Data (ISD) in the ISD Table: Load Shape Categories. An illustration of the data in this ISD table is shown in Appendix 1 (the actual data items in the table are set out in the ISD specification). All term meanings are set out in ISD glossary.

The Data Items are set out in the headers of the following ISD table:

Market Segment	GSP Group ID	Load Shape	Measurement Quantity ID	Non-Smart Switched	Off-Peak Period	Off-Peak Period	Connection Type	De- minimis
Indicator		Domestic Premises Indicator		Load Profile	(UTC) Start Time	(UTC) End Time	Indicator	Data Count
S	А	T	Al	02	00:00	07:00	W	[50]
S	_A	F	Al	04	00:00	07:00	W	[50]
S	_A	Т	AE				W	[50]
S	_A	F	AE				W	[50]
S	_B	Т	Al	02	00:30	07;30	W	[50]
S	_B	F	Al	04	00:30	07:30	W	[50]
S	_B	Т	AE				W	[50]
S	_B	F	AE				W	[50]
S	_C	Т	Al	02	00:30	07:30	W	[50]
S	_C	F	Al	04	00:00	07:00	W	[50]
S	_C	Т	AE				W	[50]
S	_C	F	AE				W	[50]
S	_D	Т	Al	02	00:30	07:30	W	[50]
S	_D	F	Al	04	00:30	07:30	W	[50]
S	_D	T	AE				W	[50]
S	_D	F	AE				W	[50]
S	_E	Т	Al	02	00:30	07:30	W	[50]
S	_E	F	Al	04	00:30	07:30	W	[50]
S	_E	Т	AE				W	[50]
S	_E	F	AE				W	[50]
S	_F	Т	Al	02	00:00	07:00	W	[50]
S	_F	F	Al	04	00:00	07:00	W	[50]
S	_F	Т	AE				W	[50]
S	_F	F	AE				W	[50]
S	_G	Т	Al	02	00:30	07:30	W	[50]
S	_G	F	Al	04	00:30	07:30	W	[50]
S	_G	T	AE				W	[50]
S	_G	F	AE				W	[50]
S	_H	T	Al	02	00:30	07:30	W	[50]
S	_H	F	Al	04	00:30	07:30	W	[50]
S	_H	Т	AE				W	[50]
S	_H	F	AE				W	[50]
S	_J	Т	Al	02	00:30	07:30	W	[50]
S	_J	F	Al	04	00:30	07:30	W	[50]
S	_J	Т	AE				W	[50]
S	_J	F	AE				W	[50]
S	_K	Т	Al	02	00:30	07:30	W	[50]
S	_K	F	Al	04	00:30	07:30	W	[50]
S	_K	Т	AE				W	[50]
S	_K	F	AE				W	[50]

Commented [TR4]: DIN-1063

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Commented [R(5]: DIN-981

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S	_L	Т	Al	02	00:00	07:00	W	[EO]
			/ 11	02	00.00	07.00	VV	[50]
S	_L	F	Al	04	00:00	07:00	W	[50]
S	_L	T	AE				W	[50]
S	_L	F	AE				W	[50]
S	_M	T	Al	02	00:30	07:30	W	[50]
S	_M	F	Al	04	00:30	07:30	W	[50]
S	_M	T	AE				W	[50]
S	_M	F	AE				W	[50]
S	_N	T	Al	02	00:00	07:00	W	[50]
S	_N	F	Al	04	00:00	07:00	W	[50]
S	_N	Т	AE				W	[50]
S	_N	F	AE				W	[50]
S	_P	T	Al	02	00:00	07:00	W	[50]
S	_P	F	Al	04	00:00	07:00	W	[50]
S	_P	T	AE				W	[50]
S	_P	F	AE				W	[50]
Α			Al				W	[50]
Α			AE				W	[50]
Α			Al				L	[50]
Α			AE				L	[50]
Α			Al				Н	[50]
Α			AE				Н	[50]
Α			Al				Е	[50]
Α			AE				Е	[50]
U		F	Al				U	[50]
U		F	AE				U	[50]

Where the indicator is blank for GSP Group this indicates the LSC includes all GSP Groups. Where the Load Shape Domestic Premises Indicator is blank, this means the LSC includes both Domestic Premise Indicators (T and F).