



Our Drainage and Wastewater Management Plan 2030-2055

Strategic Context Document:
Future Trends

Guidance Document

July 2026

DWMP28





Introduction

We've created a Future Trends webpage as a central 'go-to' resource for everything you need to know about the key trends influencing our DWMP.

This guidance document sits alongside the webpage and its supporting summary documents to help make them easier to understand and navigate.

Together, these resources support the Strategic Context - the first stage of our Drainage and Wastewater Management Plan for London and the Thames Valley, which we'll publish in 2028 and refer to as DWMP28.

The Future Trends webpage outlines the main trends that could affect our drainage and wastewater services, and how we may respond to support the delivery of reliable, sustainable services in the future. To help you navigate the content, we've split the trends into short, clear summaries, each focusing on a single trend.

This guidance document outlines what the future trends are, how we assess their impacts and how to use the summary documents to understand what the trends could mean in the future for our services, customers and the environment across our region.

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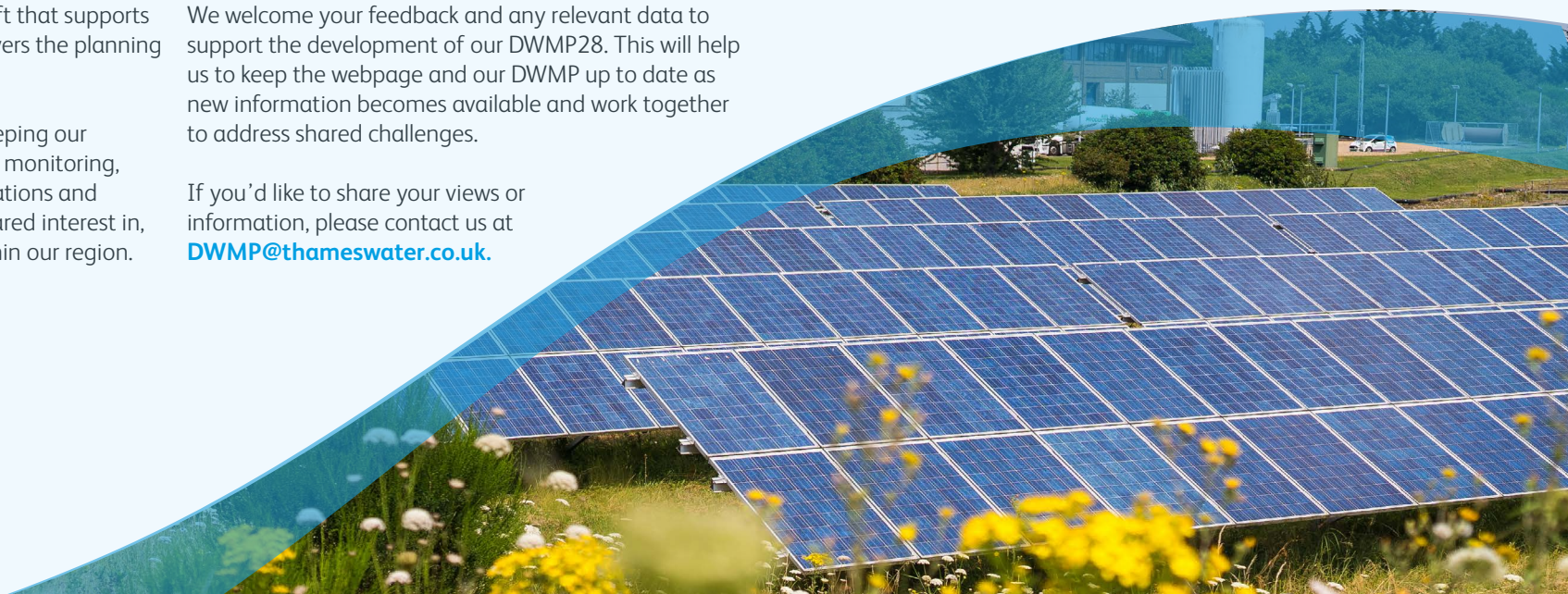


The Future Trends webpage is a working draft that supports the development of our DWMP28, which covers the planning period 2030 – 2055.

These trends highlight the importance of keeping our plan robust and responsive through ongoing monitoring, adaptability and input from partner organisations and stakeholders with responsibilities for, or a shared interest in, drainage and wastewater management within our region.

We welcome your feedback and any relevant data to support the development of our DWMP28. This will help us to keep the webpage and our DWMP up to date as new information becomes available and work together to address shared challenges.

If you'd like to share your views or information, please contact us at DWMP@thameswater.co.uk.





Future trends assessment

We live in a rapidly changing world. Over the DWMP28 planning period, we expect to face new and different challenges compared with those of the past. Many are already affecting our drainage and wastewater systems and the services we provide, and will continue to do so in the future.

The Future Trends webpage presents our assessment of the future trends set out in the DWMP regulatory guidance for UK water companies¹, alongside additional trends that are particularly

relevant to our region and long-term planning. These trends reflect local characteristics, emerging pressures, and considerations specific to our region that may influence how our services need to adapt over time.

The overview below summarises the main trends shaping the future of our drainage and wastewater systems and the services we provide. It highlights the factors most likely to drive change and inform our strategic response in the DWMP.

DWMP28 Future trends



Climate and environmental factors

- Rainfall intensity
- High river flows
- Low river flows
- Air temperatures
- Sea level
- Groundwater level and quality changes
- * River temperatures
- * Rainfall seasonality



Development and population

- Urban creep
- Planned new developments and changes in land use
- Changes associated with other drainage systems
- Population changes
- * Landlocking



Statutory and regulatory priorities

- Changing environmental regulatory requirements (for emerging contaminants)
- Designation of additional bathing waters
- Designation of additional Drinking Water Protected Areas (for rivers)
- Groundwater Safeguard Zones (for groundwater)
- Designation of additional sensitive catchment areas for nutrients
- * Changing environmental regulatory requirements (for storm overflows)



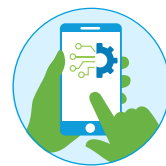
Customer and stakeholder behaviour

- Changes in customer behaviour due to demographic trends
- Per capita flow
- Changes to water efficiency technologies which may impact domestic and industrial wastewater
- Reduced disposal of commonly flushed items



Economic influences

- Changing economic conditions
- Availability of funding from other sources
- Changing customer willingness to pay
- Changing carbon values and potential introduction of carbon taxes
- Changing benefit levels
- * Ageing asset base and deteriorating asset health



Technological changes

- Increased use of online monitoring and control
- Innovative treatment options
- Increased use of wastewater and runoff
- Innovative sewer lining technology
- Low-carbon methods of construction
- Increasing overflow and water quality monitoring

Legend * Additional future trends also relevant to our region and DWMP.



¹ DWMP Guidelines : Government-published guidance on the Drainage and Wastewater Management Plan development process.

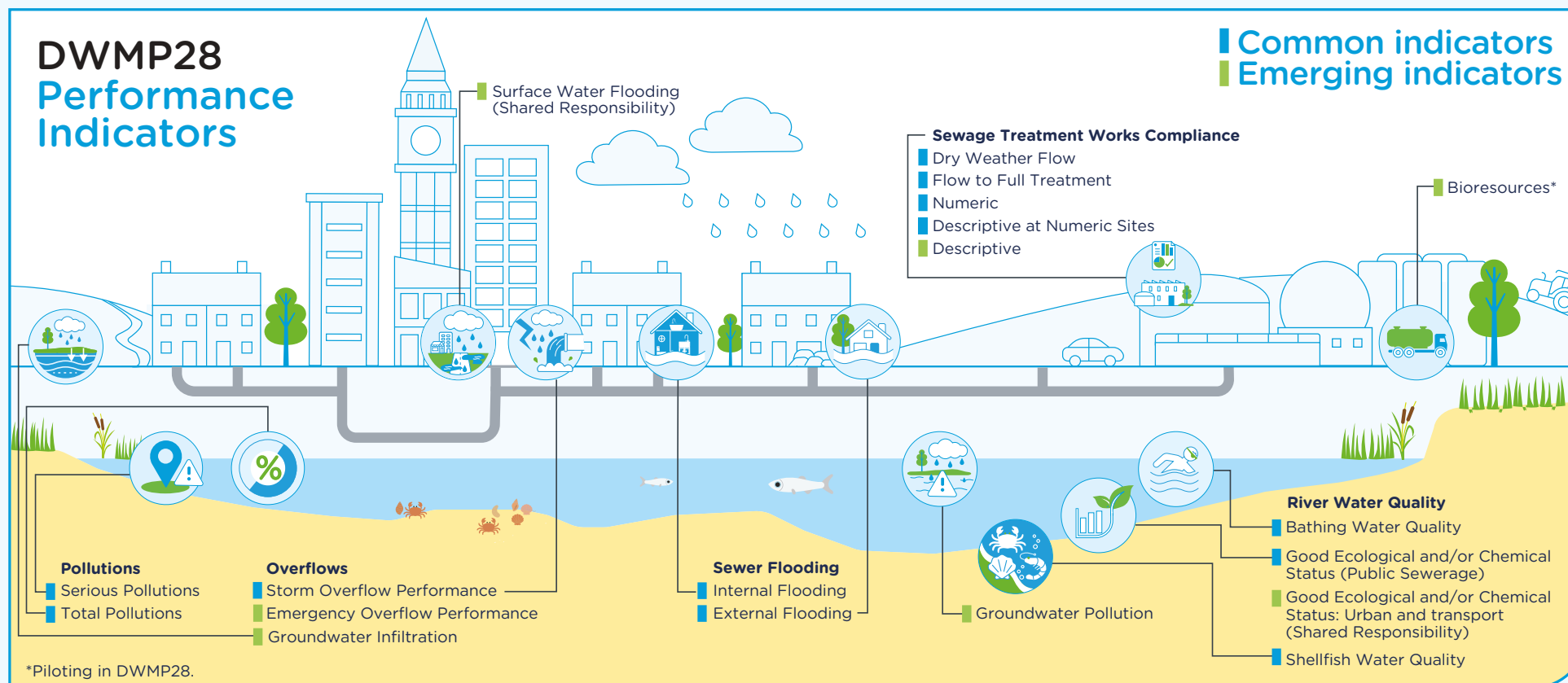


Impact of future trends

Future trends affect our drainage and wastewater services in different ways. Some, such as climate change, have a direct impact on the performance and resilience of our systems. Others, including advances in technology, are more indirect and shape how we respond to emerging challenges and opportunities. Together, these trends influence how we plan, invest in, and adapt our systems and services.

The Future Trends webpage demonstrates how we've used DWMP Performance Indicators to understand current and future performance risk, and how each future trend may impact. These indicators provide a common and emerging set of measures used by all UK water companies to assess the long-term performance of our drainage and wastewater systems and services.

The Performance Indicators are outlined below, and we provide a definition for each one in the glossary at the end of this document.





Navigating the summary documents

The Future Trends webpage is supported by a set of short, consistently structured summary documents to make it easier for navigation and comparison. We've focused on the trends that are both highly likely to happen and could have a significant impact on our DWMP28.

These future trends are used to help shape our performance assessments and long-term strategy for drainage and wastewater management. Trends with greater uncertainty will continue to be closely monitored and will be included in future updates of our DWMP.

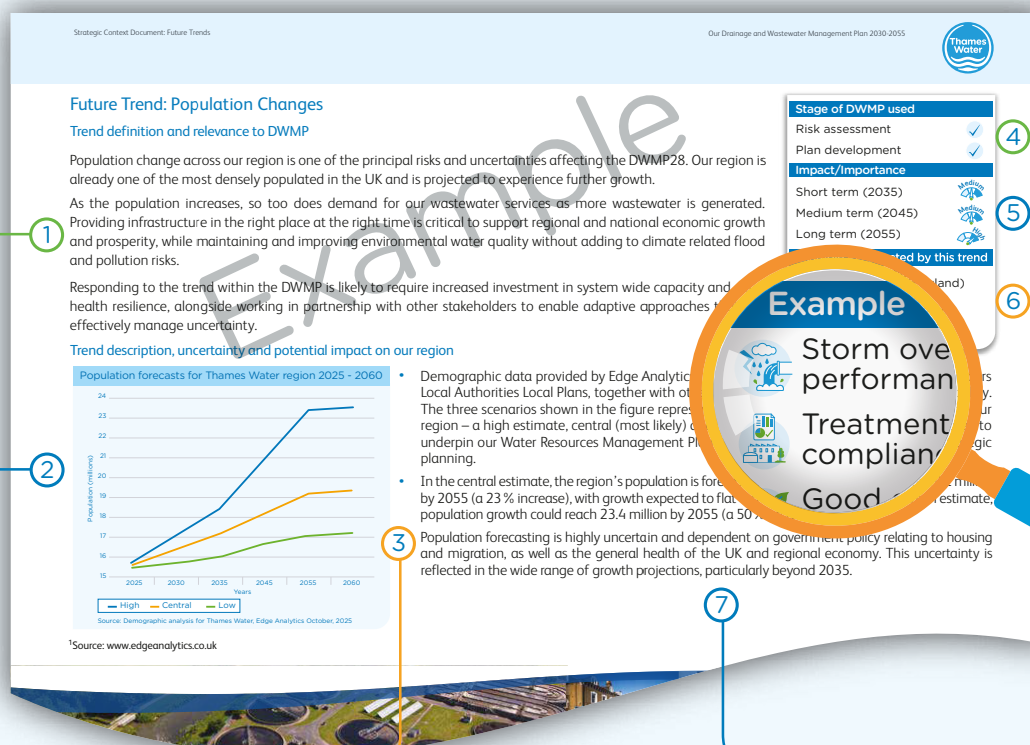
Below is an example of a future trends summary document, showing the type of information we include and the assessment we provide for each trend based on the available data.

Summary guide

Definition of each trend and how its forecast informs the DWMP28 planning process. It outlines our current understanding of the trend, highlights the uncertainty in forecasting and identifies the factors that influence it, while reinforcing the need for flexible, adaptive long-term strategies.

Inclusion of a graph or visual of the trend, where possible, over an appropriate time period, including references to the source data.

Description of how each trend is relevant to the Thames Water region. This section also provides some background information on what changes in this trend could mean, justifies why it's a key strategic driver in DWMP28 and explains how it will affect the investment approach set out in the plan.



Identification of the DWMP development process stage in which this trend will be applied:

- Risk assessment stage: forecasting the risk over time
- Plan development stage: when we consider which options to develop and how we can programme the delivery of the options to be adaptable to change.

Outline of the impact, or importance of this trend during the DWMP28 time period.

- Low: minimal impact
- High: significant impact.

Identification of some of the Performance Indicators influenced by this trend.

References to the source data used in this section and found at the end of the summary document.



Performance Indicators glossary

Performance Indicator	Description
 Bathing water quality	Number of current and future (if known) inland and coastal bathing waters where predicted performance of sewerage assets discharges will pose a risk to compliance with “sufficient” quality classification and not deteriorating from current standards, with a view to increasing the number as “good” or “excellent”.
 Emergency overflow performance	Number of emergency overflows that operate once or more per year.
 External flooding	Annual number of external sewer flooding incidents normalised per 10,000 sewer connections, in line with the latest Ofwat Performance Commitment definition. The annualised figure is to be based on reported and forecast incidents based on 1/10, 1/20, 1/30 and 1/50 return periods.
 Good ecological and chemical status	Number of RNAGS (Reasons for Not Achieving Good Status / Deterioration) associated with sewerage asset discharges (including surface water networks).
 Good ecological and/or chemical status: urban and transport (shared responsibility)	Number of RNAGS (Reasons for Not Achieving Good Status / Deterioration) attributed to discharges of urban or highway runoff and misconnections that will not be remedied through investment by us or other organisations. This only covers runoff or connections entering companies’ drainage and wastewater catchments.
 Groundwater infiltration	Annual number of discharges during ‘dry weather’ caused by increase in sewer flow from groundwater infiltration.
 Groundwater pollution	Length (km) of sewer within Source Protection Zone (SPZ) 1s (and 2s in Groundwater Safeguard Zones (SGZ)) where there are likely risks to groundwater from sewer exfiltration.
 Internal flooding	Annual number of internal sewer flooding incidents normalised per 10,000 sewer connections, in line with the latest Ofwat Performance Commitment definition. The annualised figure is to be based on reported and forecast incidents based on 1/10, 1/20, 1/30 and 1/50 return periods.
 Serious pollution incidents	Annual number of serious (Category 1 and 2) pollution incidents from sewerage undertaker sewerage assets (including public surface water networks).



Performance Indicator	Description
 Shellfish water quality	Number of current and future (if known) designated shellfish waters where predicted performance of sewerage assets discharges will pose a risk to compliance with the microbial standard specified in the Shellfish Waters Protected Areas (England and Wales) Directions.
 Storm overflow performance	Number of storm overflows predicted to be at risk of not meeting Storm Overflow Discharge Reduction Plan (SODRP) targets and/or permit non-compliance for the relevant planning horizon. Baseline of spills is based on a minimum of 10 years' worth of time-series rainfall data (2014-2024).
 Surface water flooding (shared responsibility)	Annual number of properties per 10,000 properties indicated as at medium (3.3 % AEP – 1 % AEP) and/or high (greater than 3.3 % AEP) areas at risk of surface water flooding estimated from reported incidents, local models from other RMAs and/or most recent EA surface water flood risk maps. In Wales, the flood risk maps can be found on the NRW website. This only covers surface water flooding within companies' drainage and wastewater catchments.
 Total pollution incidents	Annual number of pollution incidents (Category 1-3) per 10,000 km of wastewater network from SU sewerage assets (including surface water networks).
 Treatment works compliance (descriptive)	Annual number of wastewater treatment works predicted to fail to meet descriptive permits.
 Treatment works compliance (descriptive at numeric sites)	Annual number of wastewater treatment works predicted to fail to meet descriptive conditions at numeric permit sites.
 Treatment works compliance (dry weather flow)	Annual number of wastewater treatment works predicted to fail to meet discharge permit conditions for Dry Weather Flows.
 Treatment works compliance (flow-to-full treatment)	Annual number of wastewater treatment works predicted to fail to meet discharge permit conditions for annual Flow to Full Treatment.
 Treatment works compliance (numeric)	Annual number of wastewater treatment works predicted to fail numeric effluent quality permit limits.



DWMP28



We welcome your feedback on this guidance document and invite you to share any relevant data that may support the development of our DWMP28.

If you'd like to contribute your views or information, please contact us at **DWMP@thameswater.co.uk**.

