



The Shift Standard

Version 2.0

Technical Framework for Shift-Ready Organizations (SROs)

Taking Action on the Demographic Shift

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The Shift Standard provides a framework to help organizations understand and respond to the global demographic shift toward longer lives. It introduces the concept of Shift-Ready Organizations (SROs) and defines a set of principles and practices—grounded in research on longevity, work and economic transformation—that guide organizations in adapting their workforce, governance and market strategies to societies shaped by longer lives and a changing demographic structure.

1. Introduction: The Strategic Context of the Demographic Shift

1.1 *The Demographic Shift and the Longevity Imperative*

The world is undergoing one of the most significant demographic transformations in history. Over the past century, advances in medicine, public health, education and living standards have dramatically extended human life expectancy. In many countries, people are now living more than thirty years longer than previous generations.

Longevity economist Prof. Andrew Scott describes this transformation as the first longevity revolution: the extraordinary achievement of adding decades of life to the human lifespan. However, he argues that societies are now entering a second longevity revolution, one focused not only on living longer but on aging better—extending health, productivity, financial resilience and purpose throughout longer lives.

At the same time, fertility rates are declining in many countries, fundamentally reshaping the age structure of societies. As a result, populations are aging rapidly, and in the coming decade the number of people over the age of 60 is expected to exceed the number of children under ten.

This transformation—often referred to as the demographic shift—is changing the foundations of economic systems, labor markets and social institutions.

Yet longer lives also create what can be described as a longevity imperative. When life expectancy increases by decades, societies cannot simply extend existing systems designed for shorter lives. Instead, institutions must adapt.

Career structures, education systems, retirement models, financial planning frameworks and organizational cultures were largely designed around a three-stage life: education, work and retirement. As people live longer, healthier lives, this model is becoming increasingly misaligned with reality.

Responding to the longevity imperative, so called by Prof. Scott, requires redesigning how people work, learn, save, remain healthy and contribute across longer, multi-stage lives. The Shift Standard has been developed to support organizations in this transition, helping them assess their readiness for demographic change and build strategies suited to longer-lived societies.

1.2 *The Structural Mismatch: Systems Designed for Shorter Lives*

Despite the extraordinary gains in longevity achieved over the past century, most of the institutions that organize modern economic and social life were designed for a very different demographic reality—one in which people lived significantly shorter lives and populations were much younger.

Many of the systems that structure modern societies—including education, careers, retirement, financial planning and

health systems—were built around assumptions formed during the 20th century, when life expectancy was substantially lower and demographic pyramids were dominated by younger populations. As a result, these systems were designed to support relatively short working lives followed by retirement.

This design logic shaped what longevity researchers describe as the three-stage life model: a sequence of education, work and retirement. For decades, this model provided a stable framework for organizing careers, savings, pensions and social protection.

However, as longevity increases and demographic structures change, this model is becoming increasingly misaligned with reality. People are now living much longer, healthier lives, and many seek to remain economically and socially active well beyond traditional retirement ages. At the same time, organizations are managing workforces that include up to five generations working simultaneously.

The result is a growing structural mismatch between longer life expectancy, aging demographic structures and institutions originally designed for younger population pyramids. Labor markets struggle to adapt to extended careers. Pension systems face increasing pressure. Organizations confront new challenges in managing multigenerational teams. Financial systems must support much longer planning horizons. Health systems must shift from treating disease toward enabling healthy longevity.

This mismatch is not simply a demographic issue; it is a systemic challenge that affects productivity, social cohesion, financial stability and long-term economic growth. Addressing it requires redesigning the institutions that shape how people work, learn, remain healthy

and participate in society across longer lives.

The Shift Standard has been developed as a framework to help organizations identify these gaps and build the capabilities needed to operate successfully in longer-lived and increasingly age-diverse societies.

1.3 Organizational Implications of the Demographic Shift

The demographic shift toward longer lives and aging populations is reshaping the operating environment for organizations across all sectors. What was once viewed primarily as a public policy or social issue is increasingly becoming a strategic business challenge.

Organizations today must operate in societies where life courses are longer, careers extend over more years and workforces are more age-diverse than ever before. In many organizations, up to five generations now work side by side, bringing different skills, expectations and experiences. Managing this diversity effectively has become a critical leadership capability.

At the same time, longer lives are transforming labor markets, consumer demand and financial planning horizons. Many individuals seek to remain economically active for longer, either by extending their careers, transitioning into new professional stages or combining work with learning and caregiving responsibilities across the life course. Organizations must therefore rethink how careers are structured, how talent is developed and how productivity can be sustained across longer working lives.

The demographic shift is also creating significant market opportunities. As populations age, new needs emerge in

areas such as health, financial services, housing, mobility, technology and lifelong learning. Organizations that understand the implications of longevity will be better positioned to design products, services and business models that respond to these evolving demands.

However, many organizations still lack the frameworks, metrics and capabilities needed to translate demographic change into strategic decisions. Without clear standards or comparable indicators, leaders often struggle to assess how prepared their organizations are for longer-lived societies or where the most significant gaps lie.

Adapting to the demographic shift therefore requires a more systematic approach—one that integrates workforce strategy, health and wellbeing, financial resilience, governance and market innovation. The Shift Standard provides organizations with a structured framework to evaluate their readiness, identify opportunities for improvement and guide long-term adaptation to societies characterized by longer lives and aging populations.

1.4 From Longevity Risk to Longevity Dividend

The increase in human longevity has often been framed primarily as a risk. Longer lives are frequently associated with concerns about rising pension costs, pressure on healthcare systems, shrinking workforces and increasing dependency ratios. In many policy and business discussions, population aging is therefore portrayed as a looming economic and fiscal challenge.

However, this perspective captures only one side of the transformation. Longevity is also one of the greatest achievements of modern societies and has the potential to generate substantial economic and

social benefits if institutions adapt effectively.

Prof. Joseph Coughlin increasingly refer to this potential as the longevity dividend—the economic and societal gains that can arise when longer lives are accompanied by better health, extended participation in the workforce, stronger financial resilience and continued contributions to communities and markets.

When individuals remain healthy, productive and engaged for longer, longevity can expand the pool of experienced talent, extend periods of economic participation and stimulate innovation in products and services designed for longer life courses. It can also create new markets linked to health, financial planning, education, housing, mobility and technologies that support independence and wellbeing across the life span.

The key question, therefore, is not whether societies are aging, but how institutions respond to longer lives. If systems remain designed for shorter life spans, longevity may be perceived primarily as a risk. If institutions evolve to support longer, healthier and more productive lives, longevity can become a powerful driver of economic opportunity and social progress.

For organizations, this shift in perspective is critical. Rather than viewing demographic change only as a constraint, leaders must recognize the strategic opportunities associated with longer-lived societies. The Shift Standard has been developed to help organizations move from managing longevity risk to capturing the longevity dividend through intentional redesign of their strategies, systems and capabilities.

1.5 Purpose and Scope of The Shift Standard

The Shift Standard provides a structured framework to help organizations assess their readiness for longer-lived and aging societies. It defines a set of principles, indicators and assessment methodologies designed to guide organizational adaptation to the demographic shift. The standard applies to organizations across sectors and geographies seeking to integrate longevity considerations into strategy, governance, workforce management and market innovation.

2. Scientific and Institutional Foundations

2.1 Alignment with International Frameworks

The Shift Standard has been developed in alignment with leading international frameworks addressing population aging, healthy longevity and demographic change. These frameworks provide the conceptual and policy foundations that inform the structure of the standard and guide its dimensions and indicators.

The standard integrates insights from global institutions, including the World Health Organization (WHO), the Organisation for Economic Co-operation and Development (OECD), the World Economic Forum (WEF) and United Nations initiatives on healthy ageing and non-communicable disease prevention.

2.2 World Health Organization (WHO): Healthy Ageing and Age-Friendly Environments

The World Health Organization has established a global framework for healthy ageing, emphasizing the importance of enabling individuals to maintain functional ability, autonomy and wellbeing throughout longer lives.

WHO initiatives such as the Global Strategy and Action Plan on Ageing and Health and the Age-Friendly Cities and Communities framework highlight the need to redesign social, economic and physical environments to support aging populations.

The Shift Standard aligns with these principles by encouraging organizations to promote health, wellbeing and supportive environments that enable individuals to remain active, capable and engaged across longer life spans.

2.3 OECD: Promoting an Age-Inclusive Workforce

The OECD has produced extensive research and policy guidance on the challenges and opportunities associated with aging labor markets.

Its work on age-inclusive workplaces, longer working lives and skills development across the life course highlights the importance of adapting employment policies, talent management strategies and workplace cultures to increasingly age-diverse workforces.

The Shift Standard incorporates these insights by encouraging organizations to develop workforce architectures that support multigenerational collaboration, lifelong learning and extended career trajectories.

2.4 World Economic Forum: Longevity Economy Principles

The World Economic Forum has advanced the concept of the longevity economy, recognizing that longer lives are transforming consumption patterns, labor markets and financial systems.

The Longevity Economy Principles emphasize financial resilience, lifelong productivity, inclusive economic

participation and the development of markets that respond to the needs of longer-lived populations.

The Shift Standard integrates these principles by encouraging organizations to incorporate longevity considerations into strategic planning, financial architecture and market innovation.

2.5 UN Frameworks on Healthy Ageing and Non-Communicable Disease Prevention

United Nations initiatives—including the UN Decade of Healthy Ageing (2021–2030)—highlight the importance of promoting healthy longevity and preventing non-communicable diseases across the life course.

These frameworks emphasize prevention, health promotion and the creation of environments that enable individuals to maintain health, independence and social participation as they age.

The Shift Standard reflects these priorities by integrating healthspan and wellbeing considerations into its framework for organizational adaptation to demographic change.

2.6 Research Foundations in Longevity Economics and Demographic Change

The conceptual foundations of The Shift Standard are also informed by a growing body of academic research on longevity economics, demographic change and the redesign of institutions for longer lives.

Key contributions from researchers and institutions—including the Stanford Center on Longevity, the MIT AgeLab and leading scholars such as Andrew Scott—highlight the need to rethink work, financial systems, education and health across longer life courses.

These research insights underpin the structure of the standard and support its goal of helping organizations become Shift-Ready Organizations (SROs) in societies characterized by longer lives and aging populations.

2.7 Alignment with Regional Development Agendas

The Shift Standard also aligns with regional initiatives aimed at fostering innovation and addressing emerging development challenges in Latin America.

In particular, the framework is consistent with the priorities promoted by BID Lab, the innovation laboratory of the Inter-American Development Bank Group, which supports the development of innovative solutions to social and economic transformations affecting the region.

By contributing new standards, organizational capabilities and professional ecosystems focused on demographic change and longevity, The Shift Standard seeks to complement these broader efforts to help institutions adapt to longer lives and aging populations.

3. Technical Glossary

3.1 The Shift

The structural demographic transformation driven by increasing longevity and declining fertility rates. The Shift describes the transition toward societies characterized by longer lives and aging population structures, requiring institutions, organizations and economic systems to adapt to new demographic realities.

3.2 The Longevity Imperative

The growing necessity for institutions, organizations and societies to redesign systems originally built for shorter lives. As life expectancy increases significantly, existing models of work, education, retirement, financial planning and healthcare must evolve to support longer, healthier and more productive life courses.

3.3 The First Longevity Revolution

The historic achievement of adding decades to human life expectancy through advances in medicine, public health, sanitation and improved living standards during the 20th century.

3.4 The Second Longevity Revolution

The emerging phase of longevity focused not only on living longer but on aging better. This phase emphasizes extending healthspan, maintaining productivity and enabling individuals to remain healthy, capable and engaged throughout longer lives.

3.5 Healthy Ageing & Healthspan

Healthy ageing refers to the process of developing and maintaining the functional ability that enables wellbeing in older age. Healthspan refers to the portion of life spent in good health, free from chronic disease or major disability, emphasizing the importance of extending healthy years within longer lives.

3.6 Ageism

Ageism refers to stereotypes, prejudice and discrimination directed at individuals or groups based on their age. In organizational contexts, ageism may influence hiring, promotion, training opportunities and workplace culture.

3.7 Multigenerational Workforce

A workforce composed of employees from multiple age groups working simultaneously within the same organization. As longevity increases and retirement patterns evolve, organizations increasingly manage teams that may include up to five generations.

3.8 The Generational Challenge

The structural challenge organizations face in integrating multiple generations in the workplace while maintaining productivity, cohesion and opportunity. This includes balancing extended careers with career mobility for younger generations and fostering collaboration across age groups.

3.9 Longevity Economy

The economic activity generated by longer-lived populations and the industries that serve their evolving needs, including health, financial services, housing, mobility, technology and lifelong learning.

3.10 Silver Economy

The segment of the economy focused on the needs, preferences and consumption patterns of people aged 50 and over, representing a rapidly expanding market across many sectors.

3.11 Longevity Dividend

The economic and social benefits that can arise when longer lives are accompanied by better health, extended workforce participation, financial resilience and continued contributions to communities and markets.

3.12 Evergreen Culture

An evergreen culture recognizes aging as a continuous and malleable process. Rather than viewing age as a fixed stage associated with decline, it promotes

lifelong development, personal renewal and openness to new opportunities throughout life.

3.13 *The Shift Challenge*

A global initiative designed to support organizations, professionals and institutions in adapting to the demographic shift. The initiative promotes the development of standards, professional capabilities, research and collaborative ecosystems focused on longevity and demographic change.

3.14 *Shift-Ready Organizations (SROs)*

Organizations that have developed the strategies, policies and capabilities required to operate successfully in societies characterized by longer lives and aging populations. LROs integrate longevity considerations into workforce management, health and wellbeing, financial architecture, governance and market strategy.

4. Architecture of The Shift Standard

4.1 *Purpose of the Framework*

The Shift Standard has been developed to help organizations understand, measure and improve their readiness for societies characterized by longer lives and aging populations. As the demographic shift reshapes labor markets, consumer demand, financial systems and social structures, organizations require new frameworks to translate demographic change into strategic decisions.

The purpose of this framework is to provide a structured methodology that enables organizations to assess how effectively they are adapting to longer-lived societies and to identify opportunities for institutional redesign. By integrating insights from longevity science,

workforce transformation, demographic economics and healthy ageing, The Shift Standard supports organizations in building capabilities suited to longer life horizons.

The framework is designed to guide organizations in moving from awareness of demographic change toward concrete action. Through a combination of indicators, maturity levels and evidence-based assessment, it enables leaders to identify gaps, prioritize interventions and align organizational strategies with the realities of longer lives and aging populations.

Ultimately, the framework aims to support the emergence of Shift-Ready Organizations (SROs) capable of operating successfully in an era defined by demographic transformation.

4.2 *Principles of The Shift Standard*

The Shift Standard is designed to support organizations adapting to longer lives and evolving demographic structures. The framework is guided by the following principles:

Longevity-Oriented

Recognizes longevity as one of the defining transformations of the 21st century and focuses on enabling healthier, more productive and longer lives.

Systemic

Addresses the demographic shift as a transformation affecting multiple systems simultaneously, including work, health, finance, governance and markets.

Evidence-Based

Grounded in interdisciplinary research on longevity, demographic change, labor markets, public health and economic transformation.

Action-Oriented

Provides practical guidance that helps organizations move from awareness of demographic change to concrete strategies and implementation pathways.

Intersectional

Acknowledges that the demographic transition intersects with multiple systems—including health, work, finance, markets and social structures—and promotes integrated approaches that address these interdependencies.

Globally Applicable

Designed to be relevant across different geographies, sectors and organizational contexts.

Adaptive and Evolving

Structured as a dynamic framework that can evolve as research, demographic trends and organizational practices continue to develop.

4.3 Structure of the Standard

The Shift Standard is structured as a multidimensional framework designed to assess organizational readiness for the demographic shift, guide action pathways for institutional adaptation and generate collective learning through shared data and benchmarking. The framework recognizes that longer lives and aging populations affect multiple systems simultaneously, requiring organizations to adopt an integrated and systemic approach to adaptation.

The standard is composed of three core components.

- A. First, a set of six strategic dimensions that capture the key areas in which organizations must adapt to longer-lived societies. These dimensions reflect the systemic nature of demographic change and address workforce

- B. transformation, health and wellbeing, financial resilience, governance and market strategy.
- C. Second, a series of indicators associated with each dimension that allow organizations to assess existing practices, identify gaps and measure progress over time.
- D. Third, an assessment methodology based on maturity levels, enabling organizations to evaluate the degree to which longevity considerations are integrated into their strategies, policies and operational practices.

Together, these elements provide a structured yet flexible framework that helps organizations translate the implications of the demographic shift into concrete institutional capabilities.

4.4 The Six Dimensions of Organizational Adaptation

The Shift Standard is organized around six key dimensions that reflect the areas in which organizations must evolve in response to longer lives and aging populations. These dimensions represent the main institutional domains affected by the demographic shift and provide a comprehensive framework for evaluating organizational readiness.

The six dimensions are:

Healthspan and Wellbeing

Focused on enabling longer, healthier and more productive lives through workplace health strategies, preventive approaches and environments that support wellbeing across the life course.

Work and Purpose Architecture

Addresses the redesign of careers, work structures and learning pathways for longer and multi-stage lives, enabling individuals to remain productive and engaged throughout extended working lives.

Generational Integration

Focuses on the effective integration of multigenerational workforces, promoting collaboration, inclusion and the reduction of age-based bias within organizations.

Longevity Financial Architecture

Examines how organizations design financial systems, benefits and retirement-related structures that reflect longer and more uncertain life horizons.

Longevity Dividend and Market Strategy

Explores how organizations can transform demographic change into economic opportunity by developing products, services and business models aligned with the needs of longer-lived and ageing populations.

Demographic Governance

Encourages organizations to integrate demographic foresight into strategic decision-making, ensuring that leadership, policies and planning processes take demographic trends into account.

4.5 Technology as a Cross-Cutting Enabler

Technology and innovation play a critical enabling role in helping organizations adapt to the demographic shift. Advances in digital technologies, data analytics, artificial intelligence and health technologies are transforming how people work, remain healthy, access financial services and participate in economic and social life across longer lifespans.

Within The Shift Standard, technology is considered a cross-cutting enabler that interacts with each of the six dimensions. Digital tools can support healthier lives through preventive health technologies, facilitate lifelong learning and flexible work arrangements, enable financial planning for longer life horizons and generate new products and services tailored to aging populations.

Organizations that effectively leverage technology can accelerate their ability to respond to demographic change, increase productivity across age-diverse workforces and expand innovation opportunities within the longevity economy.

4.6 Narrative Shift

The transition to longer lives requires a shift in how societies understand aging. Public discourse often frames longevity as additional years at the end of life, associated with dependency or decline. In reality, longer lives represent more time across the entire life course.

Building a longevity society therefore requires developing a more nuanced language around aging—recognizing that aging is a lifelong process affecting everyone, rather than a condition that applies only to older populations.

Organizations play a role in shaping this narrative by promoting age-inclusive cultures and challenging stereotypes about aging and productivity.

4.7 How the Dimensions Interact

The six dimensions of The Shift Standard are designed to function as an integrated system rather than as isolated domains. Organizational readiness for longer-lived societies depends on the interaction between workforce strategies, health and wellbeing, financial resilience, governance structures and market innovation.

For example, the redesign of career structures is closely linked to financial planning for longer working lives. Health and wellbeing strategies influence workforce participation and productivity. Demographic governance ensures that these considerations are incorporated into long-term strategic planning, while market strategies allow organizations to capture

opportunities emerging from demographic change.

By recognizing the interdependence of these dimensions, The Shift Standard encourages organizations to adopt a holistic approach to adaptation. Organizations that integrate these dimensions effectively are better positioned to operate successfully in societies characterized by longer lives and aging populations.

5. Standards by Dimension

5.1 Healthspan & Wellbeing

Introduction

Longer lives have created the Longevity Imperative: the need to age well. The challenge for modern societies is no longer only to extend life expectancy, but to ensure that those additional years are lived in good health, autonomy and engagement.

This shift reflects the transition from the first longevity revolution — living longer — to the second longevity revolution — living better.

In this context, the objective of institutions and organizations should not be to manage an aging society, but to help build a longevity society, where individuals can remain healthy, active and productive across longer life trajectories.

This requires pursuing what Prof. Scott describes as an Evergreen Agenda: a set of actions aimed at remaining continuously and universally relevant in societies where longevity becomes the dominant demographic reality.

A central implication of this agenda is the need to move beyond a purely negative view of aging as decline. While biological

aging involves the accumulation of molecular and cellular damage over time, longer lives also create opportunities for greater experience, contribution, relationships and purpose.

Capturing these opportunities requires addressing the health conditions that affect individuals later in life and extending healthy life expectancy so that it approaches total life expectancy.

The Shifts

- *From aging societies to longevity societies:* The challenge is not that more people are reaching older ages, but how they are aging.
- *From chronological age to biological age:* Chronological age is an increasingly poor proxy for capability and health. Organizations and institutions must move toward a more nuanced understanding of aging that recognizes variation in health, skills and productivity across individuals.
- *From treatment to prevention:* Modern health systems remain heavily oriented toward diagnosing and treating disease rather than maintaining long-term health. Yet prevention, early detection and healthy lifestyles are central to achieving the second longevity revolution.
- *From passive patients to active health participants:* In a longevity society, individuals must become active participants in maintaining their health. Healthy aging becomes a recursive process, where decisions taken earlier in life influence health outcomes decades later.

In societies with longer lives, organizations increasingly influence how people age.

Work environments, career structures, social connections, financial security and lifestyle conditions all shape long-term health outcomes.

Healthy aging is therefore influenced by factors that extend far beyond traditional healthcare systems, including:

- the nature of work
- social interaction
- physical activity
- nutrition
- financial security
- urban design
- workplace culture
- digital health technologies and health monitoring tools

Organizations that aim to become Longevity-Ready must therefore recognize their role in enabling individuals to maintain health, autonomy and productivity across longer careers.

Improving how people age does not only have individual health benefits; it also generates significant economic gains.

Research shows that even modest improvements in healthy aging can produce substantial macroeconomic impacts. For example, adding just one additional year of healthy life expectancy can increase GDP by approximately 3–4%, due to longer workforce participation, lower healthcare costs, and higher productivity.

Organizations that actively support healthspan contribute directly to capturing the longevity dividend.

Related Dimensions

- **Work & Purpose Architecture (5.2)**
Health and wellbeing are key determinants of individuals' ability to remain productive and engaged across longer careers.

- **Longevity Financial Architecture (5.4)**
Maintaining health over longer lives reduces financial vulnerability and supports long-term financial security.
- **Longevity Dividend & Market Strategy (5.5)**
The growing demand for products and services that support healthy aging is a major driver of the longevity economy.

Core Principle

Longevity-Ready Organizations actively support the healthspan of their workforce by creating environments that promote physical, mental and social wellbeing across the life course.

Their objective is not simply to manage illness, but to enable individuals to remain healthy, engaged and capable over longer working lives.

Standards

HW1 — Healthy Work Environment

The organization provides a work environment that promotes physical, mental and social wellbeing. Workplace design, organizational culture and working conditions support the long-term health and wellbeing of employees, including attention to mental health, stress management and social connection.

HW2 — Preventive Health & Wellbeing

The organization actively promotes preventive health behaviors and healthy lifestyles among employees. Programs and initiatives encourage physical activity, healthy nutrition, mental wellbeing and early health awareness, supporting employees in maintaining their health across longer careers. Preventive initiatives may also leverage digital health

tools, data insights or technology-enabled health programs that support early detection and health monitoring.

HW3 — Inclusive Benefits

The organization provides wellbeing benefits and support mechanisms adapted to different life stages. Benefits and policies recognize that health needs evolve across the life course and may include support related to parenthood, caregiving responsibilities, menopause, mental health and other life transitions.

HW4 — Longevity-Ready Workplace

Work design, policies and workplace conditions allow employees to sustain productivity, autonomy and wellbeing across longer careers. Flexible work arrangements, sustainable workloads and supportive organizational practices enable individuals to remain active and productive over time.

Evidence Requirements

Organizations may demonstrate alignment with this dimension through documentation and data such as:

- workplace wellbeing policies and programs
- occupational health and safety policies
- mental health or wellbeing initiatives
- employee wellbeing surveys or internal monitoring systems
- documentation of health promotion programs or campaigns
- benefits policies addressing different life stages
- evidence of flexible work or workplace wellbeing initiatives.

5.2 Work & Purpose Architecture

Introduction

Longer lives are transforming the structure of work and careers. Traditional economic and organizational systems were largely designed around a three-stage life model: education, work and retirement. As life expectancy increases, this model becomes increasingly misaligned with how individuals live, learn and contribute over time.

In societies characterized by longer lives, careers are likely to become longer, more dynamic and multi-stage, involving periods of work, learning, transition and reinvention across the life course.

Research from institutions such as the MIT AgeLab, the Stanford Center on Longevity, and leading scholars including Prof. Andrew Scott highlights that sustaining productivity across longer lives requires organizations to rethink how work is structured, how careers evolve and how individuals maintain purpose and engagement throughout extended working lives.

Supporting longer productive lives is not only beneficial for individuals. When people remain active and productive for longer, the benefits extend across the broader economy through higher labor force participation, greater productivity and stronger economic growth.

However, this transition requires organizations to move beyond rigid career structures and develop age-friendly work environments, continuous learning opportunities and flexible career pathways that allow individuals to remain engaged, capable and motivated throughout longer careers.

Extending working lives is not only about financial sustainability or economic productivity. As people age, motivations often shift toward meaningful goals, contribution and social connection. Studies by Laura Carstensen at Stanford

show that individuals increasingly prioritize emotionally meaningful activities when they perceive time as more limited. Work environments that enable purpose, contribution and engagement therefore become central to sustaining longer careers.

At the same time, ageism—both structural and internalized—remains a significant barrier to longer working lives. Stereotypes about aging often restrict opportunities for older workers, despite strong evidence that experience, judgment and social intelligence continue to develop with age. Organizations seeking to become Longevity-Ready must actively challenge these assumptions and create age-inclusive environments that recognize the value of experience and intergenerational collaboration.

Technological change, particularly the rapid development of artificial intelligence and automation, is also reshaping the future of work. While new technologies may replace certain tasks, they also create opportunities to extend productive careers by augmenting human capabilities, improving productivity and enabling more flexible forms of work.

Research from institutions such as the MIT AgeLab and the Stanford Center on Longevity highlights that when technology is designed and implemented in age-inclusive ways, it can help individuals remain productive and engaged across longer careers. Digital tools, remote collaboration technologies and AI-assisted work environments can support continuous learning, reduce physical strain and enable new forms of contribution across the life course.

Organizations that aim to become Longevity-Ready must therefore ensure that technological transformation—including the adoption of artificial intelligence—supports human

capability, adaptability and lifelong learning, rather than reinforcing exclusion or accelerating workforce obsolescence.

The Shifts

Achieving longer, productive and meaningful careers requires several structural shifts:

- From three-stage lives to multi-stage lives: Traditional life models organized around education, work and retirement are increasingly replaced by more flexible trajectories involving multiple phases of work, learning, transition and reinvention.
- From front-loaded education to lifelong learning: Skills acquired early in life are no longer sufficient for careers that may span 50 years or more. Continuous learning and periodic reskilling become essential.
- From fixed retirement to flexible transitions: Career endings are increasingly gradual rather than abrupt, with individuals moving through different forms of work, contribution and engagement over time.
- From age-based assumptions to capability-based opportunity: Chronological age becomes a weaker predictor of capability and productivity. Organizations must shift toward evaluating individuals based on skills, experience and potential rather than age.
- From linear careers to portfolio careers: Individuals may move across roles, sectors and professional identities throughout their lives, combining different forms of work, learning and contribution.

Related Dimensions

- Healthspan & Wellbeing (5.1)
Sustaining longer careers depends

on maintaining physical, cognitive and emotional health across the life course.

- **Generational Integration (5.3)**
Multi-stage careers increase the overlap between generations in the workplace, requiring stronger collaboration and knowledge exchange.
- **Longevity Financial Architecture (5.4)**
Longer and more flexible careers are a key factor in maintaining financial security across extended lifespans.

Core Principle

Longevity-Ready Organizations design work environments and career architectures that enable individuals to remain productive, adaptable and purposeful across longer and more dynamic working lives.

Rather than assuming a linear career followed by retirement, organizations support multi-stage careers, continuous learning and flexible transitions that allow individuals to renew skills, maintain motivation and contribute across extended working lives.

These organizations recognize that sustaining productivity over longer lives requires enabling people to continuously evolve their capabilities, redefine their roles and maintain a strong sense of purpose.

Standards

WP1 — Multi-Stage Career Design

The organization recognizes that careers increasingly unfold across multiple stages and provides structures that support transitions, reinvention and evolving

professional roles over time. Career pathways allow individuals to move across functions, responsibilities or career phases without requiring strictly linear progression.

WP2 — Lifelong Learning & Reskilling

The organization supports continuous learning and reskilling throughout the employee lifecycle. Employees are encouraged to update skills and participate in learning opportunities that prepare them for evolving roles, technological change and career transitions. Learning is treated as a continuous process rather than a phase limited to early career stages. The organization leverages digital learning platforms and technology-enabled tools to support scalable skills development, including digital and AI-related capabilities required to remain productive in technology-enabled work environments.

WP3 — Flexible Career Pathways

The organization enables flexible career trajectories that allow employees to adapt work intensity, responsibilities or roles over time. Flexible arrangements may include phased career transitions, internal mobility, project-based roles or other structures that allow individuals to remain active and productive across longer careers.

WP4 — Purpose and Meaningful Work

The organization fosters work environments that enable individuals to maintain motivation, engagement and a sense of purpose throughout longer careers.

As people age, motivations often shift toward goals that are socially meaningful and emotionally rewarding. Organizations

support these evolving motivations by creating opportunities for mentoring, knowledge transfer, collaboration and meaningful contribution across career stages. Work environments value experience and encourage individuals to continue contributing their knowledge, capabilities and social capital over time.

Evidence Requirements

Organizations may demonstrate alignment with this dimension through documentation and data such as:

- policies or frameworks related to career development and internal mobility
- lifelong learning or professional development programs
- reskilling and training initiatives
- mentoring or knowledge transfer programs
- policies supporting flexible career paths or role transitions
- internal workforce development strategies
- employee engagement or career development surveys.

5.3 *Generational Integration*

Introduction

Longer lives are transforming the demographic composition of societies and organizations. For the first time in history, multiple generations are living, working and interacting simultaneously over extended periods of time.

In this context, organizations increasingly operate with workforces that may include four or even five generations. This creates both an opportunity and a challenge: the opportunity to benefit from diverse perspectives, experience and skills, and the challenge of ensuring fair

opportunities, collaboration and mutual understanding across age groups.

However, this demographic transition unfolds within cultural and institutional frameworks that were largely built around age-segregated life stages, where education, work and retirement occurred in clearly separated phases.

As life trajectories become longer and more fluid, these structures become increasingly misaligned with reality.

One of the main barriers to fully realizing the benefits of longer lives is ageism—the set of stereotypes, prejudices and institutional practices that undervalue individuals based on age.

Ageism operates both externally and internally. At the societal level, it shapes policies, labor markets and organizational practices that limit opportunities for older individuals. At the individual level, it becomes internalized, influencing expectations about one's own capabilities and future prospects.

Research shows that ageism can significantly affect labor market participation, career opportunities and investment in personal development later in life.

According to estimates by AARP, age discrimination in employment costs the United States economy hundreds of billions of dollars annually due to lost productivity and reduced labor force participation.

At the same time, societies must also address the generational challenge created by longer lives.

As generations overlap for longer periods, questions of fairness, opportunity and economic progress become more complex. Younger generations may

perceive reduced opportunities for advancement, while older generations may face barriers to continued participation in work and society.

Ensuring that longer lives benefit all generations therefore requires strengthening intergenerational cooperation, reducing stereotypes and creating environments where individuals of different ages can collaborate, learn from one another and contribute their capabilities.

Organizations play a critical role in fostering this integration by promoting inclusive cultures, equitable opportunities and structures that encourage collaboration across generations.

The Shifts

Achieving effective generational integration requires several cultural and organizational shifts:

- From age segregation to age integration: Traditional life structures separated generations into distinct phases and institutions. In longevity societies, individuals of different ages increasingly learn, work and collaborate together.
- From age-based stereotypes to capability-based recognition: Assumptions about productivity, adaptability or innovation based solely on chronological age limit opportunities and overlook the diversity of skills, health conditions and life trajectories across individuals. In longevity societies, understanding differences in biological and thanatological age becomes increasingly relevant for recognizing capabilities across the life course.
- From generational conflict to generational collaboration: Longer lives require stronger cooperation

between generations to sustain economic growth, knowledge transfer and social cohesion.

Related Dimensions

- **Work & Purpose Architecture (5.2)**
Multi-stage careers increase the presence of multiple generations in the workforce and require structures that support collaboration across age groups.
- **Longevity Dividend & Market Strategy (5.5)**
Understanding generational diversity is essential for organizations seeking to respond to demographic change and evolving market needs.
- **Demographic Governance (5.6)**
Organizational leadership and governance play a critical role in shaping age-inclusive policies and addressing generational dynamics.

Core Principle

Longevity-Ready Organizations foster environments where individuals of different generations can collaborate, contribute and thrive.

They actively challenge age-based stereotypes and promote cultures that value the diversity of experience, perspectives and capabilities that different generations bring.

By enabling collaboration, knowledge exchange and equitable opportunities across age groups, organizations strengthen both organizational performance and social cohesion.

Standards

GI1 — Age-Inclusive Culture

The organization promotes a culture that values individuals across all ages and actively challenges age-based stereotypes. Policies, communication and leadership practices support age inclusion and discourage discrimination or bias based on age.

GI2 — Intergenerational Collaboration

The organization encourages collaboration between employees of different generations. Structures and practices support knowledge exchange, mentoring relationships and teamwork across age groups.

GI3 — Age-Diverse Talent Strategies

The organization adopts talent management strategies that value age diversity across recruitment, development and career opportunities. Hiring practices, career development pathways and internal mobility policies are designed to ensure fair access to opportunities across age groups.

GI4 — Knowledge Transfer Across Generations

The organization facilitates mechanisms for sharing knowledge, experience and skills between generations. This may include mentoring programs, reverse mentoring, collaborative learning initiatives or other structures that support mutual learning.

Evidence Requirements

Organizations may demonstrate alignment with this dimension through documentation and data such as:

- diversity, equity and inclusion policies that include age as a dimension of diversity
- internal policies addressing age discrimination or age inclusion
- mentoring or reverse mentoring programs
- intergenerational collaboration initiatives
- workforce demographic data
- employee surveys related to inclusion or age diversity
- internal communication or leadership initiatives promoting age-inclusive culture.

Evidence may include internal policies, program descriptions, workforce data, reports or other documentation demonstrating how the organization promotes generational integration.

5.4 Longevity Financial Architecture

Introduction

Longer lives are transforming the financial foundations of individuals, organizations and societies. Traditional financial systems—including retirement planning, pension schemes and savings models—were largely designed for societies where life expectancy was significantly shorter and retirement periods were relatively limited.

As longevity increases, these financial architectures become increasingly strained. Pension systems across many countries face structural challenges due to demographic change, while a significant proportion of workers around the world lack access to formal retirement systems.

In this context, maintaining financial security over longer lives requires fundamental changes in how individuals earn, save, invest and manage risk across the life course.

Research on longevity economics highlights that sustaining financial wellbeing in longer lives depends on several interrelated factors: working longer, saving more and investing effectively. At the same time, individuals must increasingly manage financial risks that were previously absorbed by governments or employers.

One of the most significant shifts associated with longer lives is the transfer of responsibility for retirement security from institutions toward individuals. As defined benefit pension systems decline and longevity increases, individuals face a growing risk of outliving their financial resources, often referred to as longevity risk.

This transformation requires greater financial awareness, improved financial literacy and new financial products capable of supporting longer and more uncertain life trajectories.

Financial architecture must therefore evolve to support longer working lives, flexible retirement transitions and mechanisms that allow individuals to sustain financial wellbeing across extended lifespans.

Organizations play an important role in this transition by helping individuals understand financial risks, supporting financial education and facilitating access to tools and services that enable long-term financial planning.

The Shifts

Adapting financial systems to longer lives requires several structural shifts:

- From short retirement periods to longer financial horizons. Longer lives extend the period individuals must finance after traditional retirement ages, requiring new

approaches to savings, investment and income generation.

- From institutional responsibility to individual financial agency. Responsibility for retirement security increasingly shifts from governments and employers toward individuals, making financial literacy and planning more critical.
- From protection against early death to protection against longevity risk. Traditional insurance systems were designed to protect families from the financial consequences of early death. In longevity societies, financial systems must increasingly protect individuals from the risk of living longer than expected.

Related Dimensions

Work & Purpose Architecture (5.2) – longer careers support financial sustainability.

Longevity Dividend & Market Strategy (5.5) – longevity creates demand for new financial solutions.

Core Principle

Longevity-Ready Organizations support financial wellbeing and long-term financial security by helping individuals understand and manage the financial implications of longer lives.

They recognize that financial security across longer lifespans depends on a combination of savings, investment, insurance, continued employability and informed financial decision-making.

Organizations contribute to this objective by promoting financial literacy, facilitating access to financial planning tools and supporting individuals in preparing for longer and more dynamic life trajectories.

Standards

LF1 — Financial Literacy

The organization develops employees' financial capabilities through education, tools and resources that support day-to-day financial decision-making. Initiatives may include financial education programs, practical resources on budgeting, saving and investing, and accessible digital platforms that help individuals build core financial skills across different stages of their working lives.

LF2 — Longevity Risk Awareness

The organization helps employees understand how longer lifespans and demographic change transform financial planning. Initiatives focus on building awareness of longevity as a structural shift, including its implications for retirement, savings and career duration. Communication and learning experiences are designed to enable understanding and proactive thinking, rather than focusing solely on financial products or technical knowledge.

LF3 — Long-Term Financial Decision Support

The organization enables employees to translate financial knowledge and longevity awareness into concrete long-term decisions. This includes access to tools, advisory services or structured programs that support financial planning across extended life trajectories, considering factors such as longer careers, evolving income patterns and the limitations of traditional retirement systems. Organizations at this level actively support employees in evaluating scenarios and making informed decisions about savings, retirement timing and financial strategies.

LF4 — Financial Resilience & Wellbeing

The organization promotes financial wellbeing as a long-term capability, supporting employees in building resilience and sustaining financial stability over time. Programs address financial stress, encourage responsible financial behaviors and support employees through key financial transitions. This may include integrated wellbeing strategies, behavioral interventions and partnerships that strengthen financial resilience across different life stages.

Evidence Requirements

Organizations may demonstrate alignment with this dimension through documentation and data such as:

- financial literacy or financial wellbeing programs
- retirement planning resources or advisory services
- internal communication materials related to financial education
- partnerships with financial institutions or financial advisors
- employee surveys related to financial wellbeing
- documentation of financial planning tools or benefits offered to employees.

5.5 Longevity Dividend & Market Strategy

Introduction

Longer lives are not only transforming societies and labor markets; they are also reshaping economic demand.

As life expectancy increases and populations age, the number of people living longer, healthier and more active lives is expanding rapidly. This

demographic transformation is generating new patterns of consumption, new needs across the life course and new economic opportunities.

Economists refer to these gains as the Longevity Dividend: the economic benefits generated when longer lives are accompanied by improvements in health, productivity and social participation.

When individuals remain healthy, engaged and economically active for longer, societies benefit from higher labor participation, lower healthcare costs and stronger economic growth.

At the same time, longer lives are creating one of the largest emerging markets of the twenty-first century. The growing demand for products, services and solutions that support healthy aging, financial security, lifelong learning, mobility and wellbeing is reshaping industries across the global economy.

However, many organizations continue to design products, services and marketing strategies based on outdated demographic assumptions that overlook the diversity, capabilities and aspirations of longer-living populations.

Organizations that seek to become Longevity-Ready recognize longevity not only as a workforce challenge but also as a strategic market opportunity.

By understanding demographic change and evolving consumer needs across longer lives, organizations can develop new value propositions, innovate products and services and capture emerging opportunities in the longevity economy.

The Shifts

Capturing the longevity dividend requires several strategic shifts.

- From aging as a social cost to longevity as an economic opportunity: Longer lives are often framed as a fiscal burden on healthcare and pension systems. In reality, healthier and more productive older populations can generate significant economic growth.
- From youth-centric markets to longevity markets: Many industries remain focused primarily on younger consumers. Organizations must recognize the growing economic importance of older and longer-living populations.
- From chronological segmentation to life-course understanding: Traditional marketing often segments consumers by chronological age. Longevity societies require deeper understanding of evolving needs, capabilities and aspirations across the life course.
- From products designed for decline to products designed for longer active life: Products and services should support autonomy, wellbeing, participation and productivity across longer lifespans rather than focusing only on dependency in later life.
- From static markets to longevity-driven innovation: As longevity reshapes consumption patterns, organizations must develop innovation strategies that respond to emerging needs across health, finance, housing, mobility, education and lifestyle.

Core Principle

Longevity-Ready Organizations recognize longer lives as a major economic

transformation and integrate longevity into their market strategies.

They identify emerging opportunities created by demographic change and develop products, services and value propositions that support individuals across longer, healthier and more active lives.

By aligning innovation, product development and market strategy with the realities of longevity societies, these organizations contribute to capturing the longevity dividend.

Standards

LM1 — Longevity-Aware Market Strategy

The organization recognizes demographic change and longer lives as factors influencing market dynamics and strategic opportunities. Market analysis considers the implications of longevity for consumer needs, product development and long-term demand.

LM2 — Age-Inclusive Product and Service Design

The organization designs products and services that respond to the needs and preferences of individuals across different stages of life. Product development processes consider accessibility, usability and inclusivity for diverse age groups. The organization considers principles of digital accessibility and inclusive design, ensuring that digital platforms, products and services remain usable and accessible for individuals across different ages and capabilities.

LM3 — Longevity Innovation

The organization explores opportunities to innovate in response to demographic change. Innovation strategies may include the development of new products, services or business models that support longer, healthier and more active lives.

LM4 — Responsible Longevity Economy Participation

The organization contributes to the development of markets that support wellbeing, autonomy and financial security across longer lives. Business strategies align commercial opportunities with broader societal goals related to healthy aging, economic inclusion and intergenerational fairness.

Evidence Requirements

Organizations may demonstrate alignment with this dimension through documentation and data such as:

- market research or strategy documents referencing demographic trends
- product development frameworks considering age-inclusive design
- innovation initiatives related to longevity or aging populations
- marketing strategies addressing diverse life stages
- internal analyses identifying opportunities in longevity-related markets
- partnerships or initiatives related to the longevity economy.

Evidence may include strategy documents, product development policies, research reports or other materials demonstrating how longevity considerations influence market strategy.

5.6 Demographic Governance

Introduction

Demographic change is one of the most significant structural transformations shaping economies and societies in the twenty-first century. Increasing life expectancy, declining fertility rates and shifting age structures are altering the composition of workforces, consumer markets and social systems around the world.

Despite the scale of this transformation, demographic change is often insufficiently integrated into organizational strategy and decision-making. Many institutions continue to operate with assumptions based on demographic realities that no longer exist.

For organizations seeking to become Longevity-Ready, understanding demographic trends is not only a matter of workforce planning but also a strategic capability.

Demographic governance refers to the capacity of organizations to recognize, monitor and integrate demographic change—including longer lives and evolving age structures—into leadership decisions, strategic planning and institutional design.

Organizations that develop this capability are better positioned to anticipate talent dynamics, adapt workforce strategies and respond to the broader social and economic implications of demographic change.

In longevity societies, demographic awareness becomes an essential component of responsible leadership and long-term organizational resilience.

The Shifts

Adapting governance and leadership structures to demographic change requires several strategic shifts:

- From demographic blindness to demographic awareness: Organizations must move from treating demographic change as an external societal issue to recognizing it as a core strategic factor affecting talent, markets and long-term growth.
- From short-term planning to long-term demographic thinking: Traditional business planning often focuses on short-term cycles. Longevity societies require longer time horizons that consider demographic trends unfolding over decades.
- From age-neutral policies to age-aware governance: Policies that ignore age dynamics may unintentionally reinforce inequalities or inefficiencies. Effective governance recognizes the implications of age diversity and longer lives.
- From fragmented initiatives to integrated demographic strategy: Organizations increasingly need coordinated approaches that align workforce policies, leadership strategies and market responses to demographic change.

Core Principle

Longevity-Ready Organizations integrate demographic change into leadership, governance and strategic decision-making.

They recognize longer lives and shifting age structures as structural forces shaping the future of work, markets and societies, and develop governance frameworks capable of responding to these transformations.

Through demographic awareness and long-term planning, organizations strengthen their capacity to anticipate challenges, seize opportunities and contribute to more sustainable longevity societies.

Standards

DG1 — Demographic Awareness

The organization's leadership recognizes demographic change — population aging and increasing longevity — as a structural trend that will impact its workforce, its markets and its long-term sustainability.

DG2 — Integration of Longevity in Organizational Strategy

The organization incorporates demographic change into its strategic thinking and decision-making, considering its implications for talent management, organizational design and business opportunities.

DG3 — Workforce Demographic Insight

The organization develops visibility over the demographic composition of its workforce and uses this information to understand current and emerging risks, opportunities and talent dynamics.

DG4 — Long-Term Strategy

The organization translates demographic insight into forward-looking strategies that address longer careers, evolving talent availability, shifting market dynamics and the long-term opportunities and risks arising from an aging society. This is where action happens: demographic insight becomes organizational strategy — across talent, markets and business model.

Evidence Requirements

Organizations may demonstrate alignment with this dimension through documentation and data such as:

- workforce demographic data and analytics
- strategic planning documents referencing demographic trends
- leadership communications or reports addressing demographic change
- talent management strategies that consider age diversity
- internal reports or dashboards tracking workforce demographics
- workforce planning frameworks incorporating long-term demographic trends.

Evidence may include internal reports, strategic documents, workforce data or other materials demonstrating how demographic change is integrated into governance and leadership processes.

5.7 Alignment with International Frameworks

The indicators included in this dimension are aligned with widely recognized international frameworks related to sustainable development, corporate responsibility and inclusive workplaces.

United Nations Sustainable Development Goals (SDGs)

This dimension contributes primarily to:

- SDG 3 – Good Health and Well-being
- SDG 4 – Quality Education
- SDG 5 – Gender Equality
- SDG 8 – Decent Work and Economic Growth
- SDG 9 – Industry, Innovation and Infrastructure
- SDG 10 – Reduced Inequalities
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- SDG 11 – Sustainable Cities and Communities

Global Reporting Initiative (GRI)

Relevant reporting standards include:

- GRI 401 – Employment
- GRI 403 – Occupational Health and Safety
- GRI 404 – Training and Education
- GRI 405 – Diversity and Equal Opportunity
- GRI 413 – Local Communities
- GRI 416 – Customer Health and Safety
- GRI 417 – Marketing and Labelling

ISO Standards

Several indicators are conceptually aligned with international management and responsibility frameworks such as:

- ISO 30415 – Diversity and Inclusion
- ISO 45001 – Occupational Health and Safety
- ISO 21542 / ISO 30182 – Accessibility and Age-friendly environments
- ISO 26000 – Social Responsibility

These references are not intended as formal certification requirements but as points of alignment that facilitate integration with existing ESG, sustainability and governance frameworks used by organizations globally.

6. Assessment Methodology

6.1 The Shift Impact Assessment

The Shift Impact Assessment is the evaluation tool used to measure how prepared an organization is to operate in societies characterized by longer lives and evolving demographic structures.

The assessment evaluates organizations across the six dimensions of the Shift Standard and their associated standards. Each organization completes a structured

self-assessment that evaluates the maturity of its policies, practices and organizational capabilities.

Certification is granted at the country level, recognizing that workforce structures, regulatory environments and demographic dynamics vary across national contexts.

The assessment is designed to provide both an evaluation of current practices and a roadmap for organizations seeking to become Shift-Ready Organizations (SROs).

6.2 Scoring System and Evaluation Logic

Each standard is evaluated through a set of indicators that assess the degree to which the organization addresses the issue in a structured and systematic way.

For each indicator, organizations select one of three possible responses reflecting their level of maturity.

Score	Level	Description
1	Not Addressed	The organization does not currently address the issue in a structured way.
2	In Development	The organization has begun to address the issue through specific initiatives or policies.
3	Integrated	The organization addresses the issue in a structured, systematic and organization-wide manner.

Each standard includes three indicators.

Scores are calculated as follows:

- Indicator score: 1–3 points
- Standard score: average of the three indicators
- Dimension score: average of the standards within the dimension
- Overall score: average across all six dimensions

The final score provides an overall picture of the organization’s readiness to operate in a longevity society.

6.3 Maturity Levels

The Shift Assessment identifies three levels of organizational maturity:

Not Addressed

The organization has not yet developed policies, practices or initiatives related to the standard.

In Development

The organization has begun to implement initiatives or policies related to the standard, but practices remain partial or limited in scope.

Integrated

The organization addresses the issue through structured policies, programs and organizational practices implemented consistently across the organization.

These maturity levels help organizations understand where they stand in their transition toward becoming Longevity-Ready.

6.4 Adaptive Assessment Model

The Shift Assessment follows a progressive evaluation model designed to balance accessibility with rigor.

Organizations complete a self-assessment across all standards. Evidence requirements vary depending on the maturity level selected:

Level 1 — Not Addressed
No evidence is required.

Level 2 — In Development
Organizations provide a short written explanation describing existing initiatives or actions related to the indicator.

Level 3 — Integrated

Organizations provide both a written explanation and supporting documentation, such as internal policies, reports, program descriptions or other relevant materials.

This approach allows organizations at different stages of maturity to participate in the assessment while maintaining credibility in the evaluation process.

6.5 Certification and Recognition

Organizations may receive one of the following outcomes based on their overall assessment score.

The Shift Certified

Organizations that reach a minimum score of 2.0 out of 3 receive the The Shift Certified designation.

This threshold reflects a meaningful level of organizational engagement while recognizing that longevity readiness remains an emerging field where many organizations are still developing capabilities.

The Shift Committed

Organizations that do not yet reach the certification threshold may receive the designation The Shift Committed, recognizing organizations that are actively working toward alignment with the Shift Standard.

Distinction Badges

In addition to certification, organizations may receive distinction badges recognizing outstanding performance in specific dimensions.

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- The Shift Healthspan & Wellbeing Distinction
- The Shift Work & Purpose Distinction
- The Shift Generational Integration Distinction
- The Shift Longevity Financial Distinction
- The Shift Demographic Governance Distinction
- The Shift Longevity Market Distinction

These recognitions highlight organizations demonstrating leadership or advanced practices in specific areas of the standard.

6.6 Organizational Benchmarking

Organizations receive a benchmarking report as part of the assessment results.

The report includes:

- overall assessment score
- score by dimension
- comparison with the global average of assessed organizations.

As the number of participating organizations increases, benchmarking will progressively expand to include industry-specific comparisons, which will become available once a sufficient number of organizations within the same industry have completed the assessment.

Benchmarking allows organizations to understand their relative position and identify areas for improvement.

7. Certification Process

7.1 Onboarding Session

Organizations beginning the certification process participate in an onboarding session conducted by The Shift team.

During this session, participants receive an introduction to:

- the objectives of the Shift Standard
- the structure of the assessment
- how to navigate and complete the digital platform
- evidence requirements and documentation guidelines.

This session ensures that organizations clearly understand the assessment process and evaluation criteria before starting the assessment.

7.2 Assessment Completion

Organizations complete The Shift Impact Assessment through the online platform.

Each indicator includes guidance designed to support organizations in completing the assessment, including:

- explanations of the indicator
- frequently asked questions (FAQ)
- practical examples of initiatives aligned with the standard.

Organizations respond to each indicator and upload supporting information when applicable.

7.3 Review and Evaluation

Once the assessment is completed and submitted, the Shift team reviews the responses and supporting materials.

This review evaluates the consistency of the responses and verifies that the

information provided aligns with the maturity level selected for each indicator.

If necessary, organizations may be contacted to provide clarifications or additional information.

7.4 Review & Documentary Verification

Once the assessment is submitted, the Shift team conducts a review of the responses and supporting materials provided by the organization.

This review evaluates the internal consistency of the responses and verifies that the information submitted aligns with the maturity level selected for each indicator.

Evidence requirements vary depending on the maturity level:

Level 1 – Not Addressed: no evidence is required.

Level 2 – In Development: the organization provides a brief written explanation describing existing initiatives or actions addressing the indicator.

Level 3 – Integrated: the organization provides a written explanation accompanied by supporting documentation such as internal policies, reports, program descriptions or other relevant materials.

The purpose of this stage is to ensure that the practices described in the assessment are supported by credible documentation and reflect the organization's actual level of implementation.

7.5 Certification Decision and Independent Review

Following the review and verification stages, a certification decision is made based on the organization's final assessment score and the validation of the information and documentation provided.

The Shift team evaluates whether the organization meets the minimum threshold required to obtain certification under the Shift Standard. Organizations that meet the required score receive the designation The Shift Certified, while those that do not yet meet the threshold may receive the designation The Shift Committed, recognizing organizations that are actively working toward alignment with the standard.

If questions remain unresolved during the review process or additional verification is required, the case may be referred to Acrux Partners, acting as an independent and impartial external reviewer. Acrux Partners may review the submitted documentation and provide an independent determination to ensure the integrity and credibility of the certification process.

Organizations demonstrating outstanding performance in specific dimensions may also receive Shift Distinction Badges, recognizing leadership in those areas of the standard.

7.6 Results and Certification Report

Following the review process, organizations receive:

- their overall assessment score
- scores by dimension

- benchmarking against the global average
- a Shift Certification Report summarizing results and recommendations.

This report provides organizations with insights into their current level of readiness and identifies potential areas for improvement.

7.7 Internal Communication of Results

Certified organizations also receive a presentation designed for internal communication purposes.

This presentation allows organizations to share the results of the assessment with leadership teams and employees, helping build internal awareness around demographic change and the transition toward longevity-ready organizations.

For organizations with more than 250 employees, The Shift team may deliver this presentation directly to the organization as part of the certification process.

8. Validity Period and Renewal

8.1 Validity

The Shift Certification is valid for a period of two years.

At the end of this period, organizations may undergo reassessment to maintain their certification status. The renewal process allows organizations to update their assessment, demonstrate progress and reflect new initiatives implemented since the previous evaluation.

Regular reassessment supports continuous improvement and ensures that certified organizations remain aligned with evolving practices related to longevity readiness.

8.2 Use of The Shift Certification Seal

Organizations that obtain certification are authorized to use The Shift Certification Seal to communicate their status as a Shift Certified organization.

The certification seal may be used in:

- corporate communications
- sustainability or ESG reports
- marketing and public relations materials
- digital platforms and corporate websites.

Use of the certification seal must follow the communication guidelines established by The Shift Standard to ensure consistent and accurate representation of the certification.

Organizations holding distinction badges may also reference these recognitions in their communications.

Unauthorized or misleading use of the certification seal may result in the suspension or revocation of certification status.

9. Annexes and References

9.1 Methodological Notes

This section provides additional explanations regarding the methodology

used in the development and application of the Shift Standard.

The Shift Impact Assessment is designed as a structured evaluation framework that measures how organizations are adapting to longer lives and evolving demographic structures. The methodology combines principles from organizational assessment frameworks, sustainability standards and research on longevity, work and economic transformation.

Scores are derived from a set of indicators grouped into standards and dimensions. Each indicator is evaluated using a maturity scale that reflects the level of organizational implementation, ranging from practices not yet addressed to practices that are integrated across the organization.

The methodology is designed to balance accessibility and rigor. It allows organizations at different stages of readiness to participate while maintaining credibility through documentary verification and an independent review process when necessary.

As the ecosystem of participating organizations grows, the assessment framework may evolve to incorporate additional benchmarking capabilities, industry comparisons and new indicators reflecting emerging practices related to longevity readiness.

9.2 Bibliography and Global References

The conceptual foundations of the Shift Standard draw upon a growing body of interdisciplinary research on longevity,

demographic change, the future of work and economic transformation.

Key sources informing the development of the framework include research from:

- the Stanford Center on Longevity
- the MIT AgeLab
- the OECD and other international policy institutions
- academic research on demographic economics and aging societies
- global studies on the longevity economy and generational change.

Selected works by leading scholars, including Prof. Andrew J. Scott, Lynda Gratton, Laura Carstensen, Joseph Coughlin and others, have informed the conceptual approach underlying the Shift Standard.

Additional references may include academic publications, policy reports and global research addressing topics such as healthy aging, longevity economics, generational integration and workforce transformation.

9.3 International Frameworks Referenced

The Shift Standard has been developed with awareness of existing international standards and frameworks addressing sustainability, governance, workplace wellbeing and social impact.

While the Shift Standard focuses specifically on demographic change and longevity readiness, its architecture draws inspiration from established global frameworks, including:

- ESG reporting frameworks addressing social and governance practices
- international standards related to workplace wellbeing and organizational health
- frameworks promoting inclusive workplaces and diversity management
- global initiatives addressing the longevity economy and demographic change.
- recommended usage in digital and printed materials
- examples of how certification and distinctions may be referenced in organizational communications.

The Shift Standard is intended to complement existing frameworks by introducing a dedicated lens focused on the structural implications of longer lives and changing demographic structures.

9.4 Certification Seal and Distinction Badges

Organizations that successfully complete the certification process are authorized to display The Shift Certification Seal, indicating their status as a Shift Certified Organization.

This annex will include the official graphic versions of:

- The Shift Certified Seal
- The Shift Committed Seal
- Shift Distinction Badges associated with the different dimensions of the standard.

Guidelines for the appropriate use of these visual elements will also be provided to ensure consistent and accurate communication of certification status.

These guidelines may include:

- approved visual versions of the certification seal