



— THE DEMOGRAPHIC READINESS STANDARD

# THE SHIFT STANDARD

A Technical Framework for Shift-Ready Organizations (SROs)

VERSION

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Acting on  
demographic change.

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# 01

## Introduction

The strategic context of demographic change

The Shift Standard offers a framework to help organizations understand and respond to the global shift toward longer lives. It introduces the idea of Shift-Ready Organizations (SROs) and sets out principles and practices—grounded in research on longevity, work, and economic change—to guide how the workforce, governance, and market strategy adapt.

## 1.1 Demographic change and the longevity imperative

The world is living through one of the most far-reaching 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 now live more than thirty years longer than earlier generations did.

The longevity economist Prof. Andrew Scott describes this as the first longevity revolution: the remarkable achievement of adding decades to the human lifespan. But he argues that societies are now entering a second longevity revolution—one focused not just on living longer, but on aging better, by extending health, productivity, financial resilience, and purpose across those longer lives.

At the same time, fertility rates are falling in many countries, fundamentally reshaping the age structure of societies. Populations are aging quickly, and within the next decade the number of people over 60 is expected to surpass the number of children under ten.

This transformation—often called demographic change—is reshaping the foundations of economic systems, labor markets, and social institutions.

Longer lives also create what can be described as a longevity imperative. When life expectancy rises by decades, societies cannot simply stretch existing systems that were built for shorter lives. Institutions have to adapt.

Career paths, education systems, retirement models, financial-planning frameworks, and organizational cultures were largely built around a three-stage life: education, work, and retirement. As people live longer, healthier lives, that model fits reality less and less.

Meeting the longevity imperative, as Prof. Scott calls it, means rethinking how people work, learn, save, stay healthy, and contribute across longer, multi-stage lives. The Shift Standard was created to support organizations through this transition—helping them gauge how ready they are for demographic change and build strategies suited to a world of longer lives.

## 1.2 The structural gap: systems built for shorter lives

Despite the remarkable gains in longevity 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 markedly shorter lives and populations were far younger.

Many of the systems that structure modern societies—education, careers, retirement, financial planning, and health care among them—were built on twentieth-century assumptions, when life expectancy was considerably lower and age pyramids were dominated by the young. As a result, these systems were designed to support relatively short working lives followed by retirement.

That design logic produced what longevity researchers call the three-stage life: a sequence of education, work, and retirement. For decades, it offered a stable way to organize careers, savings, pensions, and social protection.

But as longevity rises and demographic structures change, that model is increasingly out of step with reality. People now live much longer, healthier lives, and many want to stay economically and socially active well beyond traditional retirement ages. At the same time, organizations are managing workforces that can span as many as five generations at once.

The result is a widening structural gap between longer life expectancy and aging demographics on one side, and institutions designed for younger populations on the other. Labor markets struggle to accommodate extended careers. Pension systems face mounting pressure. Organizations confront new challenges in managing multigenerational teams. Financial systems must support far longer planning horizons. And health systems must shift from treating illness to enabling healthy longevity.

This gap is not simply a demographic problem; it is a systemic challenge that affects productivity, social cohesion, financial stability, and long-term economic growth. Closing it means redesigning the institutions

that shape how people work, learn, stay healthy, and take part in society over longer lives.

The Shift Standard was developed as a framework to help organizations spot these gaps and build the capabilities they need to succeed in societies marked by longer lives and growing age diversity.

### 1.3 What demographic change means for organizations

The shift toward longer lives and aging populations is redefining the operating environment for organizations across every sector. What was once seen mainly as a matter of public or social policy is steadily becoming a strategic business challenge.

Organizations now operate in societies where lives are longer, careers run for more years, and workforces are more age-diverse than ever. In many organizations, as many as five generations work side by side, each bringing different skills, expectations, and experience. Managing that diversity well has become a critical leadership capability.

At the same time, longer lives are reshaping labor markets, consumer demand, and financial-planning horizons. Many people want to stay economically active for longer—whether by extending their careers, moving into new professional stages, or combining work with learning and caregiving across the life course. Organizations therefore need to rethink how careers are structured, how talent is developed, and how productivity can be sustained over longer working lives.



Demographic change is also opening up significant market opportunities. As populations age, new needs are emerging in areas such as health, financial services, housing, mobility, technology, and lifelong learning. Organizations that understand the implications of longevity will be better placed to design products, services, and business models that meet this evolving demand.

Yet many organizations still lack the frameworks, metrics, and capabilities to turn demographic change into strategic decisions. Without clear standards or comparable indicators, leaders often find it hard to judge how ready their organizations are for longer-lived societies, or where the most significant gaps lie.

Adapting to demographic change therefore calls for a more systematic approach—one that brings together workforce strategy, health and wellbeing, financial resilience, governance, and market innovation. The Shift Standard gives organizations a structured way to assess their readiness, identify opportunities to improve, and guide long-term adaptation to societies defined by longer lives and aging populations.

### 1.4 From longevity risk to longevity dividend

Rising human longevity has often been framed first and foremost as a risk. Longer lives tend to be linked with worries about rising pension costs, pressure on health systems, shrinking workforces, and higher dependency ratios. In many policy and business debates, population aging is cast as a looming economic and fiscal challenge.

But that view captures only one side of the transformation. Longevity is also one of the great achievements of modern societies, and it has the potential to generate substantial economic and social benefits if institutions adapt effectively.

Prof. Joseph Coughlin refers to that potential as the Longevity Dividend: the economic and social gains that can emerge when longer lives come with better health, greater workforce participation, stronger financial resilience, and continued contributions to communities and markets.

When people stay healthy, productive, and engaged for longer, longevity can widen the pool of experienced talent, extend periods of economic participation, and spur innovation in products and services built for longer lives. It can also create new markets tied to health, financial planning, education, housing, mobility, and the technologies that support independence and wellbeing across the life course.

The key question, then, is not whether societies are aging, but how institutions respond to longer lives. If systems stay designed for short lives, longevity may be experienced mainly as a risk. If institutions evolve to support longer, healthier, more productive lives, longevity can become a powerful engine of economic opportunity and social progress.

For organizations, this change in perspective is critical. Rather than seeing demographic change only as a constraint, leaders need to recognize the strategic opportunities that come with longer-lived societies. The Shift Standard was developed to help organizations move from managing longevity risk to capturing the Longevity Dividend—by intentionally redesigning 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 how ready they are for societies with longer lives and aging populations. It sets out a set of principles, indicators, and assessment methods designed to guide organizational adaptation to demographic change. The standard applies to organizations across sectors and regions that want to build longevity into their strategy, governance, workforce management, and market innovation.

# 02

## Scientific and institutional foundations

Alignment with international frameworks

The scientific and institutional grounding of the standard, and how it lines up with the leading international frameworks on healthy aging, age-inclusive work, and the longevity economy: the WHO, the OECD, the World Economic Forum, and the United Nations.

## 2.1 Alignment with international frameworks

The Shift Standard was developed in alignment with the leading international frameworks that address population aging, healthy longevity, and demographic change. These frameworks provide the conceptual and policy grounding that shapes the structure of the standard and guides its dimensions and indicators.

The standard draws on the work of 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 aging and the prevention of noncommunicable diseases.

## 2.2 World Health Organization (WHO): Healthy aging and age-friendly environments

The World Health Organization has established a global framework for healthy aging, emphasizing the importance of helping people maintain their functional ability, autonomy, and wellbeing across longer lives.

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

The Shift Standard reflects these principles by encouraging organizations to promote health, wellbeing, and supportive environments that allow people to stay active, capable, and engaged over longer lives.

## 2.3 OECD: Building an age-inclusive workforce

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



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

The Shift Standard builds on these ideas by encouraging organizations to design workforce architectures that support multigenerational collaboration, lifelong learning, and extended career paths.

## 2.4 World Economic Forum: Principles of the longevity economy

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.

Its Longevity Economy Principles emphasize financial resilience, sustained productivity, inclusive economic participation, and the development of markets that respond to the needs of longer-lived populations.

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

## 2.5 UN frameworks on healthy aging and the prevention of noncommunicable diseases

United Nations initiatives—including the UN Decade of Healthy Ageing (2021–2030)—underscore the

importance of promoting healthy longevity and preventing noncommunicable diseases across the life course.

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

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

## **2.6 The research base in longevity economics and demographic change**

The conceptual foundations of The Shift Standard also draw on 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—make the case for rethinking work, financial systems, education, and health across longer life courses.

These research perspectives underpin the structure of the standard and support its goal of helping organizations become Shift-Ready Organizations (SROs) in societies marked 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 championed by BID Lab, the innovation laboratory of the Inter-American Development Bank Group, which supports the development of innovative responses to the social and economic transformations affecting the region.

By contributing new standards, organizational capabilities, and professional ecosystems centered on demographic change and longevity, The Shift

Standard seeks to complement these broader efforts to help institutions adapt to longer lives and aging populations.

# 03

## Technical glossary

Definitions of the longevity framework

A glossary of the framework's core terms and concepts—from The Shift and the longevity imperative to Shift-Ready Organizations (SROs).

### 3.1 The Shift

The structural demographic transformation driven by rising longevity and falling fertility rates. The Shift describes the move toward societies marked by longer lives and aging population structures—one that requires institutions, organizations, and economic systems to adapt to new demographic realities.

### 3.2 The Longevity Imperative

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

### 3.3 The First Longevity Revolution

The historic achievement of adding decades to human life expectancy through advances in medicine, public health, and sanitation, along with improving living conditions over the twentieth century.

### 3.4 The Second Longevity Revolution

The emerging phase of longevity focused not just on living longer but on aging better. It emphasizes extending healthspan, sustaining productivity, and enabling people to stay healthy, capable, and engaged across longer lives.

### 3.5 Healthy Ageing & Healthspan

Healthy aging refers to the process of building and maintaining the functional ability that supports wellbeing in later life. Healthspan refers to the portion of life spent in good health—free of chronic disease or major disability—emphasizing the importance of extending the healthy years within longer lives.

### 3.6 Ageism

Ageism refers to the stereotypes, prejudice, and discrimination directed at people or groups on the basis of age. In organizations, ageism can shape

hiring, promotion, access to training, and workplace culture.

### 3.7 Multigenerational workforce

A workforce made up of employees from multiple age groups working together within the same organization. As longevity rises and retirement patterns change, organizations increasingly manage teams that can span as many as five generations.

### 3.8 The Generational Challenge

The structural challenge organizations face in integrating multiple generations in the workplace while sustaining productivity, cohesion, and opportunity. It includes balancing extended careers with the upward mobility of 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 over 50—a fast-growing market across many sectors.

### 3.11 Longevity Dividend

The economic and social benefits that can emerge when longer lives come with better health, greater workforce participation, financial resilience, and continued contributions to communities and markets.

### 3.12 Evergreen Culture

An evergreen culture treats aging as an ongoing, malleable process. Instead of viewing age as a fixed stage tied to decline, it promotes continuous 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 demographic change. It promotes the development of standards, professional capabilities, research, and collaborative ecosystems centered on longevity and demographic change.

### 3.14 Shift-Ready Organizations (SROs)

Organizations that have built the strategies, policies, and capabilities needed to succeed in societies marked by longer lives and aging populations. SROs build longevity into workforce management, health and wellbeing, financial architecture, governance, and market strategy.

# 04

## **Architecture of The Shift Standard**

Principles, structure, and dimensions

The architecture of the standard: its purpose, guiding principles, overall structure, and the six dimensions through which organizations adapt to demographic change.

## 4.1 Purpose of the framework

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

The purpose of the framework is to provide a structured methodology that lets organizations assess how effectively they are adapting to longer-lived societies and identify opportunities for institutional redesign. By drawing on longevity science, workforce transformation, demographic economics, and healthy aging, The Shift Standard helps organizations build the capabilities that longer life horizons require.



The framework is designed to move organizations from awareness of demographic change to concrete action. Through a combination of indicators, maturity levels, and evidence-based assessment, it helps leaders pinpoint gaps, prioritize interventions, and align organizational strategy with the realities of longer lives and aging populations.

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

## 4.2 Principles of The Shift Standard

The Shift Standard is built to support organizations adapting to longer lives and shifting demographic

structures. The framework is guided by the following principles:

### ▶ Longevity-oriented

It recognizes longevity as one of the defining transformations of the twenty-first century and focuses on enabling longer, healthier, more productive lives.

### ▶ Systemic

It treats demographic change as a transformation that affects many systems at once—work, health, finance, governance, and markets.

### ▶ Evidence-based

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

### ▶ Action-oriented

It offers practical guidance that helps organizations move from awareness of demographic change to concrete strategies and implementation paths.

### ▶ Intersectional

It recognizes that the demographic transition intersects with many systems—health, work, finance, markets, and social structures—and promotes integrated approaches that address these interdependencies.

### ▶ Globally applicable

It is designed to be relevant across different regions, sectors, and organizational contexts.

### ▶ Adaptable and evolving

It is structured as a dynamic framework that can evolve as research, demographic trends, and organizational practice advance.

## 4.3 Structure of the standard

The Shift Standard is structured as a multidimensional framework designed to assess organizational readiness for demographic change, guide paths toward institutional adaptation, and generate collective learning through shared data and benchmarking. It recognizes that longer lives and aging populations

affect many systems at once, requiring organizations to take an integrated, systemic approach to adaptation.

The standard has three core components:

- 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 transformation, health and wellbeing, financial resilience, governance, and market strategy.
- A series of indicators tied to each dimension that allow organizations to assess current practices, identify gaps, and measure progress over time.
- An assessment methodology based on maturity levels, which lets organizations gauge how far longevity is built into their strategies, policies, and day-to-day practices.

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

#### 4.4 The six dimensions of organizational adaptation

The Shift Standard is organized around six core 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 demographic change and provide a comprehensive framework for assessing organizational readiness.

##### ► 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 paths for longer, multi-stage lives, helping people stay productive and engaged across extended working lives.

##### ► Generational Integration

Focuses on integrating multigenerational workforces effectively—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, more uncertain life horizons.



##### ► Longevity Dividend and Market Strategy

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

##### ► Demographic Governance

Encourages organizations to build demographic foresight into strategic decision-making, ensuring that leadership, policy, and planning 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 demographic change. Advances in digital technologies, data analytics, artificial intelligence, and health technology are transforming how people work, stay healthy, access financial services, and take part in economic and social life across longer lives.

Within The Shift Standard, technology is treated as a cross-cutting enabler that interacts with each of the six dimensions. Digital tools can support healthier lives through preventive health technologies, make lifelong

learning and flexible work arrangements possible, enable financial planning for longer life horizons, and generate new products and services tailored to aging populations.

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

#### 4.6 The shift in narrative

The move toward longer lives calls for a shift in how societies understand aging. Public discourse often frames longevity as extra years tacked on at the end of life, associated with dependency or decline. In reality, longer lives mean more time across the entire life course.

Building a longevity society therefore requires more nuanced language around aging—recognizing that aging is a lifelong process that affects everyone, not a condition that applies only to older populations.

Organizations have a role to play 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 work as an integrated system rather than as isolated domains. Organizational readiness for longer-lived societies depends on the interplay among workforce strategy, health and wellbeing, financial resilience, governance structures, and market innovation.

For example, redesigning career structures is closely tied to financial planning for longer working lives. Health and wellbeing strategies shape workforce participation and productivity. Demographic governance ensures these considerations are built into long-term strategic planning, while market strategy lets organizations capture the opportunities that emerge from demographic change.

By recognizing how interdependent these dimensions are, The Shift Standard encourages organizations to take a holistic approach to adaptation. Those that

integrate the dimensions effectively are better placed to operate successfully in societies marked by longer lives and aging populations.

# 05

## Standards by dimension

The six dimensions of adaptation

Detailed standards for each of the six dimensions, with their guiding principles, the changes they call for, and the evidence organizations are expected to show.

## 5.1 Healthspan & Wellbeing

### ► Overview

Longer lives have created the longevity imperative: the need to age well. For modern societies, the challenge is no longer just to extend life expectancy, but to make sure those added years are lived in good health, with autonomy and engagement.

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

In this context, the goal of institutions and organizations should not be to manage an aging society, but to help build a longevity society—one where people can stay healthy, active, and productive across longer life paths.

This calls for pursuing what Prof. Scott describes as an Evergreen Agenda: a set of actions aimed at staying 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 does involve the accumulation of molecular and cellular damage over time, longer lives also create opportunities for greater experience, contribution, relationships, and purpose.

Seizing those opportunities means addressing the health conditions that affect people in later life and extending healthspan so that it approaches total life expectancy.

### ► What needs to change

- 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 imprecise indicator of capability and health. Organizations and institutions need a more nuanced understanding of aging—one that recognizes how health, ability, and productivity vary across individuals.



- From treatment to prevention: modern health systems remain heavily oriented toward diagnosing and treating disease rather than maintaining health over the long term. 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, people need to become active participants in maintaining their health. Healthy aging becomes a recursive process, where choices made earlier in life shape health outcomes decades later.

In longer-lived societies, organizations increasingly influence how people age. Work environments, career structures, social connections, financial security, and living conditions all shape long-term health outcomes.

Healthy aging is therefore shaped by factors that reach well beyond traditional health care—including the nature of work, social interaction, physical activity, nutrition, financial security, urban design, organizational culture, digital health technologies, and health-monitoring tools.

Organizations aiming to become SROs must therefore recognize their role in helping people maintain health, autonomy, and productivity across longer careers.

Improving how people age is not only good for individual health; it also generates significant economic gains. Research shows that even modest improvements in healthspan can have substantial macroeconomic effects. Adding just one additional year of healthy life expectancy, for example, can raise GDP by roughly 3–4%, through higher labor-force

participation, lower health-care costs, and greater productivity.

Organizations that actively support the healthspan of their workforce contribute directly to capturing the Longevity Dividend.

► **Related dimensions**

- Work and Purpose Architecture (5.2): health and wellbeing are key determinants of people's ability to stay 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 and Market Strategy (5.5): growing demand for products and services that support healthy aging is a major driver of the longevity economy.

► **Core principle**

Shift-Ready Organizations (SROs) actively support the healthspan of their workforce by creating environments that promote physical, mental, and social wellbeing across the life course. The goal is not simply to manage illness, but to help people stay healthy, engaged, and capable across 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 employees' long-term health and wellbeing, including attention to mental health, stress management, and social connection.

HW2 — Preventive health and 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, helping employees maintain their health across longer careers. Preventive initiatives may draw on digital health tools, data analytics, or technology-

enabled health programs that support early detection and health monitoring.

HW3 — Inclusive benefits

The organization provides benefits, policies, and support mechanisms tailored to different life stages and caregiving responsibilities. It recognizes that health and wellbeing needs evolve across the life course and may include parenting, eldercare, dependent family members, menopause, mental health, and other life transitions.

HW4 — Longevity-ready workplace

Work design, policies, and workplace conditions allow employees to maintain productivity, autonomy, and wellbeing across longer careers. Flexible work arrangements, sustainable workloads, and supportive organizational practices help people stay active and productive over time.

► **Evidence requirements**

Organizations can 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 that account for different life stages
- evidence of flexible-work or workplace-wellbeing initiatives

## 5.2 Work and Purpose Architecture

► **Overview**

Longer lives are transforming the structure of work and careers. Traditional economic and organizational systems were largely built around a three-stage life: education, work, and retirement. As life expectancy rises, that model is increasingly out of step with how people live, learn, and contribute over time.

In societies marked 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 and the Stanford Center on Longevity, and from leading scholars such as Prof. Andrew Scott, makes clear that sustaining productivity over longer lives requires organizations to rethink how work is structured, how careers evolve, and how people sustain purpose and engagement across extended working lives.



Sustaining longer productive lives is not only good for individuals. When people stay active and productive for longer, the benefits extend to the wider economy through higher labor-force participation, greater productivity, and stronger economic growth.

This transition, however, requires organizations to move beyond rigid career structures and build age-friendly work environments, continuous learning opportunities, and flexible career paths that let people stay engaged, capable, and motivated across longer careers.

Extending working lives is not only about financial sustainability or economic productivity. As people age, their motivations often shift toward meaningful goals, contribution, and social connection. Studies by Laura Carstensen at Stanford show that people 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 major barrier to longer working lives. Stereotypes about aging often limit the opportunities of older workers, despite strong evidence that experience, judgment, and social intelligence continue to develop with age. Organizations seeking to become SROs must actively challenge these assumptions and build 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 can replace certain tasks, they also create opportunities to extend productive careers by augmenting human capabilities, improving productivity, and enabling more flexible ways of working.

Research from the MIT AgeLab and the Stanford Center on Longevity shows that when technology is designed and deployed in age-inclusive ways, it can help people stay 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 aiming to become SROs 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.

#### ► What needs to change

- From three-stage lives to multi-stage lives: traditional life models organized around education, work, and retirement are gradually giving way to more flexible paths that involve multiple phases of work, learning, transition, and reinvention.
- From initial education to lifelong learning: skills acquired early in life are no longer enough for careers that may extend 50 years or more. Continuous learning and periodic reskilling become essential.

- From abrupt retirement to flexible transitions: career exits are increasingly gradual rather than abrupt, with people 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 should move toward assessing people on their skills, experience, and potential rather than their age.
- From linear careers to portfolio careers: people 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, calling for stronger structures for collaboration and knowledge sharing.
- Longevity Financial Architecture (5.4): longer, more flexible careers are a key factor in maintaining financial security across extended lives.

#### ► Core principle

Shift-Ready Organizations (SROs) design work environments and career architectures that allow people to stay productive, adaptable, and purposeful across longer, more dynamic working lives. Rather than assuming a linear career followed by retirement, they support multi-stage careers, continuous learning, and flexible transitions that let people refresh their skills, sustain motivation, and contribute across extended working lives. These organizations recognize that sustaining productivity over longer lives means enabling people to continually 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 paths let people move across functions, responsibilities, or career phases without requiring a strictly linear progression.

##### WP2 — Lifelong learning, reskilling, and adaptation

The organization promotes continuous learning as a strategic capability for navigating an environment marked by longer lives, accelerating technological change, and ongoing transformation of work. People are encouraged to build new skills, refresh their knowledge, and prepare for evolving roles, career transitions, and new ways of working.

The organization identifies critical capabilities for the future, makes learning opportunities accessible to people of all ages, and supports adaptation to emerging technologies, including artificial intelligence and digital tools. Learning is treated as an ongoing process that strengthens employability, adaptability, and the ability to contribute across longer, more dynamic careers.



##### WP3 — Flexible career paths

The organization enables flexible career paths that let employees adjust work intensity, responsibilities, or roles over time. Flexible arrangements may include gradual career transitions, internal mobility, project-based roles, or other structures that allow people to stay active and productive across longer careers.

##### WP4 — Purpose, contribution, and social capital

The organization fosters work environments that help people sustain motivation, engagement, and a sense

of purpose across longer careers. It recognizes that motivations evolve over time and creates opportunities for people to keep contributing knowledge, experience, and value at different stages of their journey.

It also encourages the building of networks, professional relationships, and spaces for collaboration that strengthen learning, employability, innovation, and the exchange of perspectives. Longevity-ready organizations recognize that social capital is a strategic asset for easing transitions, sustaining dynamic careers, and expanding opportunities for development and contribution.

#### ► Evidence requirements

- 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 that support flexible career paths or role transitions
- internal workforce-development strategies
- employee engagement or career-development surveys

## 5.3 Generational Integration

#### ► Overview

Longer lives are transforming the demographic makeup of societies and organizations. For the first time in history, multiple generations live, work, and interact at the same time over extended periods.

In this context, organizations increasingly operate with workforces that can include four or even five generations. This is both an opportunity and a challenge: the opportunity to benefit from diverse perspectives, experiences, and skills, and the challenge of ensuring fair opportunity, collaboration, and mutual understanding across age groups.

Yet this demographic transition is playing out within cultural and institutional frameworks that were largely built around age-segregated life stages, where education, work, and retirement happened in clearly

separate phases. As life paths grow longer and more fluid, these structures are increasingly out of step with reality.

One of the main barriers to fully realizing the benefits of longer lives is ageism: the set of stereotypes, prejudice, and institutional practices that undervalue people on the basis of age. Ageism operates both externally and internally. At the societal level, it shapes policies, labor markets, and organizational practices that limit the opportunities of older people. At the individual level, it is internalized, shaping expectations about one's own abilities and future prospects.

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

According to AARP estimates, age discrimination in employment costs the U.S. economy hundreds of billions of dollars a year through lost productivity and reduced workforce 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 people 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 opportunity, and structures that encourage collaboration across generations.

#### ► What needs to change

- From age segregation to age integration: traditional life structures separated generations into distinct phases and institutions. In longevity societies, people 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 opportunity and overlook the diversity of skills, health conditions, and life paths across individuals. In longevity societies, understanding differences in biological and thanatological age becomes increasingly relevant for recognizing capabilities across the life course.
- From one-way transfer to reciprocal learning: longevity-ready organizations recognize that valuable knowledge, skills, and perspectives exist across all generations. Learning flows in multiple directions and is strengthened when people can collaborate, teach, and learn from one another.

Beyond inclusion, generational integration has become a strategic capability. Organizations that manage to connect generations, enable reciprocal learning, and draw on diverse perspectives are better prepared to innovate, adapt to change, and respond to increasingly complex environments.

#### ► Related dimensions

- Work and Purpose Architecture (5.2): multi-stage careers increase the presence of multiple generations in the workforce and call for structures that support collaboration across age groups.



- Longevity Dividend and 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): leadership and organizational governance play a critical role in shaping age-inclusive policies and addressing generational dynamics.

#### ► Core principle

Shift-Ready Organizations (SROs) foster environments where people from different generations can collaborate, learn, 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, reciprocal learning, knowledge sharing, and equitable opportunity across age groups, organizations strengthen both their capacity for innovation and adaptation and their organizational performance and social cohesion.

#### Standards

##### GI1 — Age-inclusive culture

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

##### GI2 — Intergenerational collaboration

The organization fosters collaboration among employees from different generations. Structures and practices support working together, exchanging perspectives and experiences, and building relationships that strengthen mutual understanding and cooperation across age groups.

##### GI3 — Age-diverse talent strategies

The organization adopts talent-management strategies that value age diversity in hiring, development, and career opportunities. Hiring practices, development paths, and internal-mobility policies are designed to ensure equitable access to opportunity across all age groups.

##### GI4 — Cross-generational learning and knowledge transfer

The organization enables mechanisms for sharing knowledge, experience, and skills across generations. This may include mentoring, reverse mentoring, communities of practice, collaborative learning initiatives, or other structures that support mutual

learning and the flow of knowledge in multiple directions.

► **Evidence requirements**

- 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 communications or leadership initiatives that promote an age-inclusive culture

## 5.4 Longevity Financial Architecture

► **Overview**

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 lower and retirement periods were relatively short.

As longevity rises, these financial architectures come under growing strain. Pension systems in many countries face structural challenges driven by demographic change, while a significant share of workers worldwide lacks access to formal retirement systems.

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

Research in longevity economics highlights that maintaining financial wellbeing over longer lives depends on several interrelated factors: working longer, saving more, and investing effectively. At the same time, individuals increasingly have to 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 to individuals. As defined-benefit pension systems decline and longevity rises, people face a growing risk of outliving their financial resources—often referred to as longevity risk.

This transformation calls for greater financial awareness, stronger financial literacy, and new financial products capable of supporting longer and more uncertain life paths. Financial architecture must therefore evolve to support longer working lives, flexible retirement transitions, and mechanisms that help people maintain financial wellbeing across extended lives.

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

► **What needs to change**

- From short retirement periods to longer financial horizons: longer lives extend the period people must fund beyond traditional retirement ages, calling for new approaches to saving, investing, and generating income.
- From institutional responsibility to individual financial agency: responsibility for retirement security is shifting from governments and employers to 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 people from the risk of living longer than expected.



### ► Related dimensions

- Work and Purpose Architecture (5.2): longer careers support financial sustainability.
- Longevity Dividend and Market Strategy (5.5): longevity creates demand for new financial solutions.

### ► Core principle

Shift-Ready Organizations (SROs) support financial wellbeing and long-term financial security by helping people understand and manage the financial implications of longer lives. They recognize that financial security across longer lives depends on a combination of saving, investing, insurance, continued employability, and informed financial decision-making. Organizations contribute to this by promoting financial literacy, easing access to financial-planning tools, and supporting people in preparing for longer, more dynamic life paths.

### ► Standards

#### LF1 — Financial literacy

The organization builds employees' financial capabilities through education, tools, and resources that support everyday financial decisions. Initiatives may include financial-education programs, practical resources on budgeting, saving, and investing, and accessible digital platforms that help people build core financial skills at different stages of their working lives.

#### LF2 — Longevity-risk awareness

The organization helps employees understand how longer lives and demographic change reshape financial planning. Initiatives focus on building awareness of longevity as a structural shift, including

its implications for retirement, saving, and career length. Communication and learning experiences are designed to encourage understanding and proactive thinking, rather than focusing solely on financial products or technical knowledge.

#### LF3 — Support for long-term financial decisions

The organization helps employees 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 paths—taking into account factors such as longer careers, evolving income patterns, and the limits of traditional retirement systems. Organizations at this level actively support employees in evaluating scenarios and making informed decisions about saving, retirement timing, and financial strategies.

#### LF4 — Financial resilience and wellbeing

The organization promotes financial wellbeing as a long-term capability, supporting employees in building resilience and maintaining 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 at different life stages.

### ► Evidence requirements

- financial-education or financial-wellbeing programs
- resources or advisory services for retirement planning
- 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 and Market Strategy

### ► Overview

Longer lives are not only transforming societies and labor markets; they are also reshaping economic demand. As life expectancy rises and populations age, the number of people living longer, healthier, more active lives is expanding rapidly. This demographic shift is generating new consumption patterns, 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 come with improvements in health, productivity, and social participation. When people stay healthy, engaged, and economically active for longer, societies benefit from higher labor-force participation, lower health-care costs, and stronger economic growth.

At the same time, longer lives are creating one of the largest emerging markets of the twenty-first century. 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.

Yet many organizations continue to design products, services, and marketing strategies around outdated demographic assumptions that overlook the diversity, capabilities, and aspirations of longer-lived populations.

Organizations seeking to become SROs recognize longevity not only as a workforce challenge but also as a strategic market opportunity. By understanding demographic change and the evolving needs of consumers across longer lives, organizations can develop new value propositions, innovate products and services, and capture the opportunities emerging in the longevity economy.

### ► What needs to change

- From aging as a social cost to longevity as economic opportunity: longer lives are often framed as a fiscal burden on health and pension

systems. In reality, healthier, more productive older populations can drive significant economic growth.



- From youth-centered markets to longevity markets: many industries remain focused primarily on younger consumers. Organizations need to recognize the growing economic importance of older and longer-lived populations.
- From chronological segmentation to a life-course understanding: traditional marketing often segments consumers by chronological age. Longevity societies call for a deeper understanding of evolving needs, capabilities, and aspirations across the life course.
- From products designed for decline to products designed for longer, active lives: products and services should support autonomy, wellbeing, participation, and productivity across longer lives, rather than focusing only on dependency in later life.
- From static markets to longevity-driven innovation: as longevity reshapes consumption patterns, organizations need innovation strategies that respond to emerging needs in health, finance, housing, mobility, education, and lifestyle.

### ► Core principle

Shift-Ready Organizations (SROs) recognize longer lives as a major economic transformation and build longevity into their market strategies. They identify the opportunities created by demographic change and develop products, services, and value propositions that support people across longer, healthier, more active lives. By aligning innovation, product development, and market strategy with the realities of

longevity societies, these organizations help capture the Longevity Dividend.

### ► Standards

#### LM1 — Longevity-aware market strategy

The organization recognizes demographic change and longer lives as factors that shape market dynamics and strategic opportunity. 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 meet the needs and preferences of people at different life stages. Product-development processes consider accessibility, usability, and inclusiveness for diverse age groups. The organization applies digital-accessibility and inclusive-design principles, ensuring that digital platforms, products, and services are usable and accessible for people of different ages and abilities.

#### LM3 — Innovation for longevity

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

#### LM4 — Responsible participation in the longevity economy

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

### ► Evidence requirements

- market research or strategy documents that reference demographic trends
- product-development frameworks that consider age-inclusive design
- innovation initiatives related to longevity or aging populations

- marketing strategies that address diverse life stages
- internal analyses identifying opportunities in longevity-related markets
- partnerships or initiatives related to the longevity economy

## 5.6 Demographic Governance

### ► Overview

Demographic change is one of the most significant structural transformations shaping economies and societies in the twenty-first century. Rising life expectancy, falling fertility rates, and shifting age structures are changing the composition of workforces, consumer markets, and social systems worldwide.

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

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

Demographic governance refers to an organization's ability to recognize, monitor, and build demographic change—including longer lives and evolving age structures—into leadership decisions, strategic planning, and institutional design. Organizations that develop this capability are better placed 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.

### ► What needs to change

- From demographic blindness to demographic awareness: organizations must move from treating demographic change as an external social 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 cycles. Longevity societies call for longer time horizons that account for demographic trends unfolding over decades.

- From age-neutral policies to age-aware governance: policies that ignore age dynamics can inadvertently reinforce inequities 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

Shift-Ready Organizations (SROs) build demographic change into leadership, governance, and strategic decision-making. They recognize longer lives, lower birth rates, and shifting age structures as structural forces transforming the workforce, markets, and societies. Through leadership development, demographic intelligence, and long-term planning, they strengthen their ability to anticipate challenges, identify opportunities, and adapt to a constantly changing environment.

#### ► Standards

##### DG1 — Demographic awareness

The organization's leadership recognizes demographic change—including rising longevity and falling birth rates—as a structural trend that will affect its workforce, markets, and long-term sustainability, and builds the capabilities to understand its implications and respond strategically.

##### DG2 — Integrating longevity into organizational strategy

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

##### DG3 — Internal demographic intelligence

The organization gathers, analyzes, and uses demographic information about its workforce to understand current and future trends, risks, and opportunities. This intelligence supports talent planning, knowledge continuity, the identification of critical capabilities, and organizational decision-making.

##### DG4 — Organizational action and mobilization

The organization turns demographic intelligence into concrete strategies, decisions, and initiatives that respond to the challenges and opportunities of longer lives, an evolving workforce, and changing markets. Knowledge becomes action through processes, owners, and mechanisms that drive long-term organizational adaptation.

#### ► Evidence requirements

- demographic data and workforce analytics
- strategic-planning documents that reference demographic trends
- leadership communications or reports addressing demographic change
- talent-management strategies that consider age diversity
- internal reports or dashboards that track workforce demographics
- workforce-planning frameworks that incorporate long-term demographic trends
- leadership-development programs or initiatives on demographic change, longevity, or the future of work
- analyses or projections tied to future capabilities, succession, or workforce planning

## 5.7 Alignment with international frameworks

The indicators in this dimension align 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 wellbeing
- 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
- 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 labeling

### ► ISO standards

Several indicators align conceptually 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 formal assessment requirements but points of alignment that make it easier to integrate with the ESG, sustainability, and governance frameworks organizations already use worldwide.

# 06

## Evaluation methodology

Demographic maturity assessment

The maturity-assessment approach the standard recommends putting in place: scoring logic, maturity levels, an adaptive model, and benchmarking.

## 6.1 How readiness is assessed

The standard does more than define what organizations should take into account: it also recommends putting in place a demographic-maturity assessment built on these standards. Its aim is to measure how ready an organization is to operate in societies marked by longer lives and evolving demographic structures.

An assessment of this kind should span the six dimensions of The Shift Standard and their associated standards, through a structured self-assessment that gauges the maturity of organizational policies, practices, and capabilities.

It is recommended that the assessment be carried out at the country level, recognizing that workforce structures, regulatory environments, and demographic dynamics vary across national contexts.

Its purpose is to offer both a read on current practices and a roadmap for organizations working to become Shift-Ready Organizations (SROs).

## 6.2 Scoring system and assessment logic

Each standard can be assessed through a set of indicators that reflect how structured and systematic an organization's approach to the issue is.



For each indicator, an organization would select one of three responses that reflect its level of maturity:

### SCORING SCALE

- 1 Not addressed** — The organization does not address the issue in a structured way.
- 2 Developing** — The organization has begun to address the issue through specific initiatives or policies.
- 3 Integrated** — The organization addresses the issue in a structured, systematic way across the whole organization.

Each standard includes three indicators. Scores would be calculated as follows:

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

The final score would offer an overall picture of how ready the organization is to operate in a longevity society.

## 6.3 Maturity levels

The framework identifies three levels of organizational maturity:

### ▶ Not addressed

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

### ▶ Developing

The organization has begun to put in place 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 practices applied consistently across the organization.

These maturity levels help organizations understand where they stand on the path to becoming SROs.

## 6.4 An adaptive assessment model

The framework proposes an adaptive assessment model, designed to balance accessibility with rigor. The assessment should combine a common set of questions for all organizations with additional questions for those showing greater maturity in each dimension—gathering more data and surfacing best practices from the most advanced organizations. Evidence requirements would also vary by maturity level:

Level 1 — Not addressed: no evidence would be required.

Level 2 — Developing: the organization would provide a brief written explanation describing existing initiatives or actions related to the indicator.

Level 3 — Integrated: the organization would provide both a written explanation and supporting documentation, such as internal policies, reports, program descriptions, or other relevant materials.

This approach would let organizations at different stages of maturity take part in the assessment while keeping the process credible.

## 6.5 Organizational benchmarking

Benchmarking is a central piece of this framework: comparing readiness across organizations— anonymized and by dimension—accelerates collective learning, helps surface best practices, and points improvement efforts toward where they have the most impact. A benchmarking layer built on the standard could offer:

- a read on each organization's overall level of readiness
- a dimension-by-dimension comparison against other organizations
- sector comparisons as more organizations adopt the standard

The more organizations adopt it, the more valuable benchmarking becomes: each one can better understand its relative position, spot gaps, and discover opportunities to improve and learn. The point

of the framework is not to certify, but to guide and accelerate adaptation to demographic change.

— SECTION 07

# 07

## **Appendices and references**

Notes, bibliography, and badges

Methodological notes, bibliography, and the international frameworks referenced, along with the recognition levels and badges.

## 7.1 Methodological notes

This section provides additional detail on the methodology used in developing and applying The Shift Standard.

The standard's assessment framework 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 assessed using a maturity scale that reflects the level of organizational implementation, ranging from practices not yet addressed to practices integrated across the whole organization.

The methodology is designed to balance accessibility with rigor. It allows organizations at different stages of readiness to take part while preserving credibility through documentary verification and, where needed, an independent review.

As the ecosystem of participating organizations grows, the assessment framework can evolve to add benchmarking capabilities, sector comparisons, and new indicators that reflect emerging practices in longevity readiness.

## 7.2 Bibliography and global references

The conceptual foundations of The Shift Standard draw on a growing body of interdisciplinary research on longevity, demographic change, the future of work, and economic transformation.

Key sources informing the framework's development 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 shaped the conceptual approach behind The Shift Standard. Additional references may include academic publications, policy reports, and global research addressing topics such as healthy aging, the longevity economy, generational integration, and workforce transformation.

## 7.3 International frameworks referenced

The Shift Standard was developed with an awareness of existing international standards and frameworks addressing sustainability, governance, workplace wellbeing, and social impact. While it focuses specifically on demographic change and longevity readiness, its architecture draws on established global frameworks, including:

- ESG reporting frameworks that address social and governance practices
- international standards related to workplace wellbeing and organizational health
- frameworks that promote inclusive workplaces and diversity management
- global initiatives addressing the longevity economy and demographic change

The Shift Standard is intended to complement existing frameworks by adding a dedicated perspective centered on the structural implications of longer lives and shifting demographic structures.

## 7.4 Recognition and badges

An assessment built on the standard could recognize organizations with badges according to their level of maturity in each dimension. This appendix would bring together the reference graphics for:



- The Shift 360 Recognized — badge
- The Shift Committed — badge
- The Shift Distinction Badges tied to the different dimensions of the standard

Guidelines are also proposed for the appropriate use of these visual elements, so that the level of recognition is communicated consistently and accurately. These guidelines could include:

- approved visual versions of the badges.
- recommended use in digital and print materials.
- examples of how to reference the recognition and badges in organizational communications.