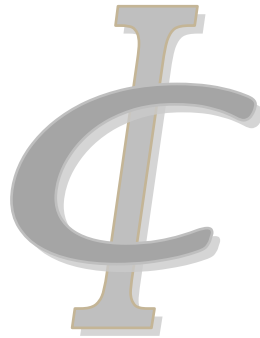


# *Institute of Chess*

Revision Guide to

**LEVEL 2**



The contents were written and arranged by

GM Chris Ward  
FM Desmond Tan.

This revision guide is dedicated to the memory of

IM Bob Wade OBE (1921 ~ 2008),

who devoted his life to chess.

Last Updated August 2016

**Institute of Chess**  
**Level 2 Coaching Course**  
**by GM Chris Ward and FM Desmond Tan**

**Index of Contents**

	<u>Page</u>
1) Notating a Game and the Four-Move Mate	2
2) Annotation Symbols	4
3) The 'Lawnmower' Checkmate	5
4) Checkmating with a King and Queen	8
5) Checkmating with a King and Rook	11
6) The Sacrifice	14
7) Tips on Stalemate	18
8) The Fork	20
9) The Pin	21
10) The Skewer	24
11) Discovered Check	26
12) Double Check	28
13) Doubling up	30
14) The 7 <sup>th</sup> Rank	33
15) The Overloaded Piece	35
16) General Opening Principles	36
17) Advice on Practical Play	44
18) Attacking and Defending Pieces	46
19) Tournament Chess	48

## **Notating a Game and the Four-Move Mate**

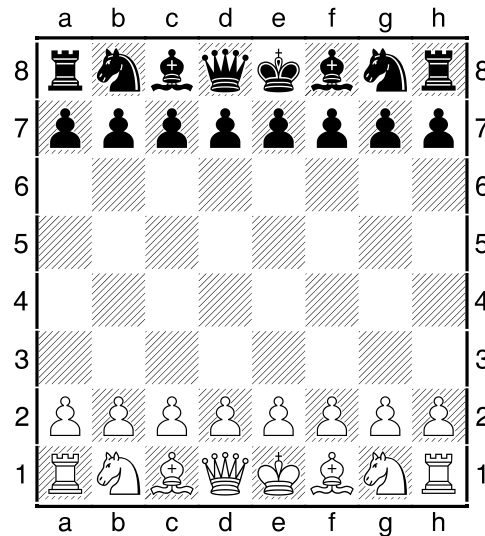
Writing the moves down is a very useful exercise for a few reasons. If you are prone to moving too quickly then it will help you slow your play down and if you have a record of it then you can play over it later in order to either enjoy a nice game that you may have had or else figure out where you went wrong! We all learn from our mistakes and if you have a correctly completed score sheet then you can show it to someone else who may be able to offer you help.

In competitions you will write down your game on specially-provided score sheets whilst some may obtain a scorebook so that they can all be written in the same place. In the absence of either of those you can of course make your own score sheet on blank paper. All you will need to ensure is that you write down the names of the players involved and have a column for the white moves and a column for the black moves.

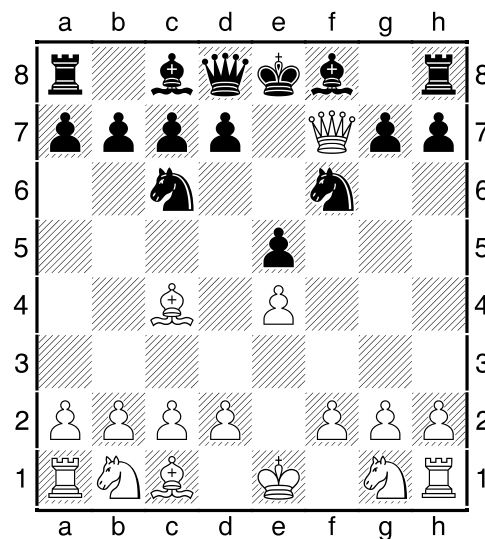
Your teacher will show you how to notate correctly using 'algebraic' notation but a few key points to remember are:

- 1) K stands for king, Q for queen, R for rook, B for bishop and N for knight even though it begins with a 'k'.
- 2) Always use capital letters then for the pieces although there is no need to put 'P' for pawn. If there is no capital letter, then it is assumed that the piece to be moved is a pawn.
- 3) Always ensure that the square 'a1' is in the bottom left hand corner of the player with the white pieces. If you have a board that doesn't have coordinates on it then you simply have to imagine that is the case and assign the other squares accordingly.
- 4) Don't use capital letters for squares. Intending rook to the square e4, correct is Re4 but wrong is rE4.
- 5) 'x' denotes a capture and a '+' at the end shows that it is check.
- 6) 0-0 stands for castling short (i.e. on the kingside) and 0-0-0 is for long castles (castling on the queenside).
- 7) If it is possible that two pieces of the same type could move to the same square, then it is necessary to differentiate between the two. This could be by either the file or rank that it starts on. For example, Nge4 would show that it is the knight on the g-file that has moved to e4. It is only necessary to put the 'g' in if for example Nce4 was also possible.

To give a very quick example of a game notation let's begin with the four-move mate that you should make yourself very familiar with to ensure that it never happens to you!



**1.e4 e5 2.Qh5 Nc6 3.Bc4 Nf6 4.Qxf7 mate.**



Particularly when using computers, you may notice that 'checkmate' is denoted by the '#' symbol. Alternatively, you could simply write 'mate' or a 1-0 or 0-1 should make it clear what the final result was.

### Annotation Symbols

Following on from the notation of games you will certainly come across ‘annotations’ of other games. This is typically where there is some analysis or commentary of a game, often involving top-ranking players. The following abbreviations applied next to moves are worth taking note of:

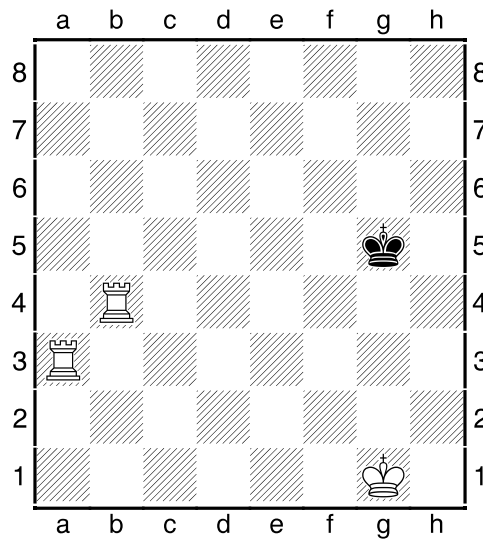
- ? A bad move
- ?? A very bad move, often referred to as a blunder.
- ! A good move
- !! A very good or excellent move.
- ?! A dubious (probably bad) move.
- !?! An interesting (and most likely good) move.

With regards our previous 4-move game, the move **3...Nf6** (note the dots show that it is Black’s rather than White’s 3<sup>rd</sup> move) would be annotated with a ‘??’, as it is a quite dreadful move that pays no attention whatsoever to what White was threatening.

Although strictly speaking I guess you could argue that **4 Qxf7** is deserving of a ‘!!’ that tends not to be the way when it is a rather obvious continuation.

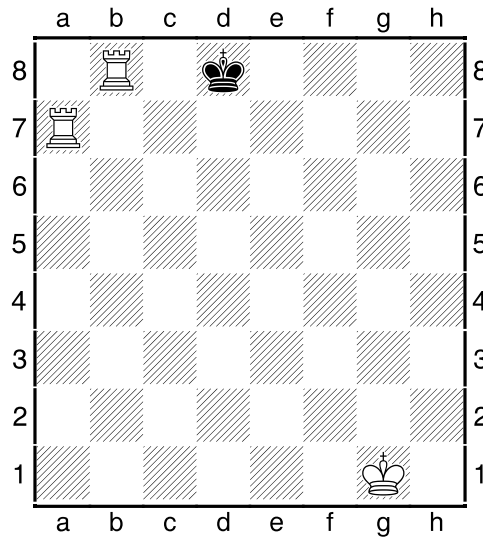
### The 'Lawnmower' Checkmate

One idea that juniors seem to get very excited about getting to grips with is the lawnmower technique demonstrated below.

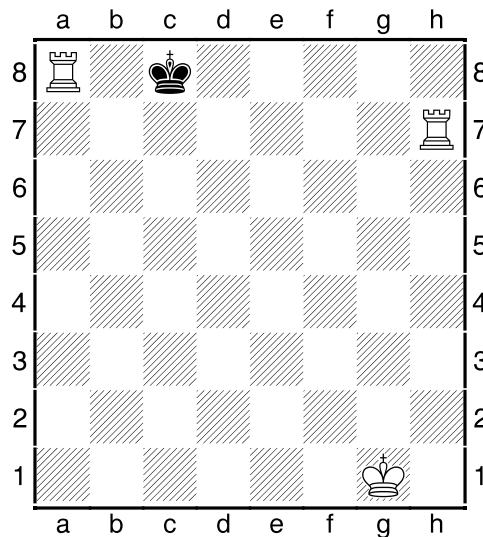


Above the white rook on b4 prevents the black king from coming down the board. After the other rook checks along the rank above i.e. **1 Ra5+** the black king is forced to move back. Of course it has a choice of three retreat squares but assuming White knows what he is doing, the only chance is to try to catch a rook off guard. Hence, **1...Kf6** but after **2 Rb6+ Ke7 3 Ra7+ Kd8 4 Rb8 mate** it didn't get there in time.

Note how the white rooks worked in tandem, with each controlling a rank of their own rather than doubling up. One rook stayed behind whilst the other advanced and then they switched duties. The king is a good piece in the endgame but it is a slow one just the same. If it had managed to approach the white rooks sufficiently in order to interfere with the checking sequence, then all White needed to have done was to switch one or both rooks over to other side of the board where they still control the same ranks.

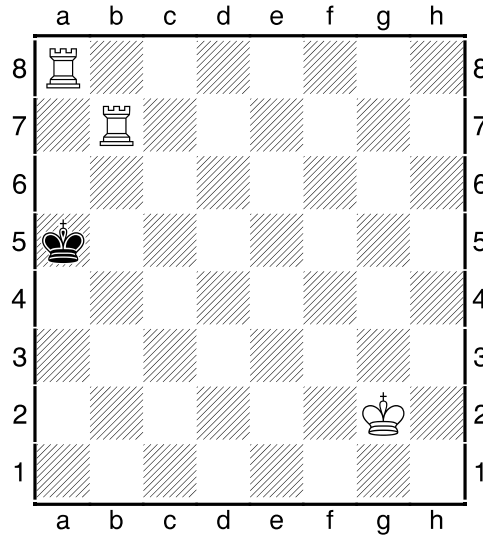


Above is the final position of our last example and up next are two more lawnmower checkmate positions. In the first the white rook may have been on the b-file but switched to the h-file when the black king got too close. Just because the rooks aren't side by side though doesn't mean that they can't continue to work in tandem.



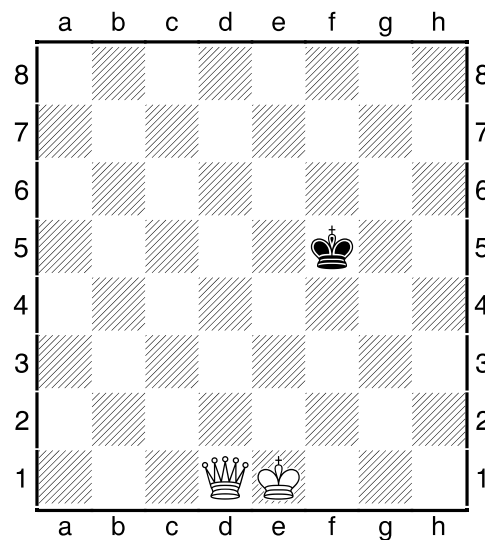
Remember the lines going across are **ranks** and the ones going up and down are **files**. Rooks of course move along ranks and files.

The next example may also have seen the same technique employed only with White working with files instead of ranks. Though it may appear visually odd to a human, to rooks which operate along straight lines, it is of course all the same!





## Checkmating with a King and Queen



### **1.Qd4**

There is more than one way to set about delivering checkmate but one favourite idea is to let the queen do all the work to trap the enemy king on an edge. Once that is achieved the attacking king can wander over to help provide the killing blow. Note how the queen on d4 restricts the black king to just one portion of the board.

### **1...Ke6**

Or 1...Kg5 2.Qe4 and the black king is being slowly forced to either the back or side edge.

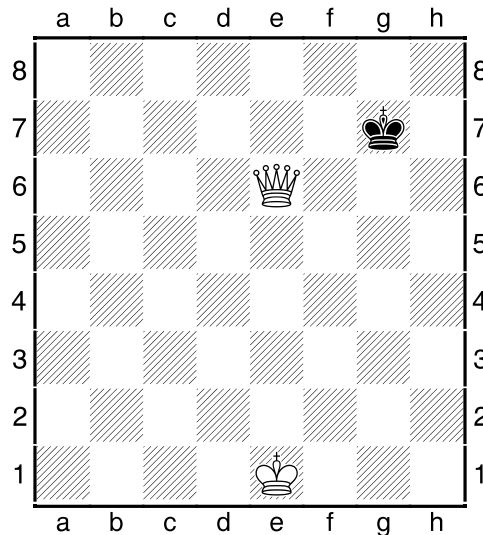
### **2.Qc5 Kf6 3.Qd5 Kg6**

Or of course 3...Ke7 4.Qc6.

### **4.Qe5 Kf7**

Upon 4...Kh6 5.Qg3 the black king is trapped on the side edge and the white king is ready to advance e.g. 5...Kh5 6.Kf2 Kh6 7.Kf3 Kh7 8.Kf4 Kh6 9.Kf5 Kh7 10.Kf6 Kh8 11.Qg7 mate.

### **5.Qd6 Kg7 6.Qe6**



Now wherever the black king moves the white queen can 'cut it off' on an edge.

**6...Kf8**

Or 6...Kh7 7.Qg4

**7.Qd7**

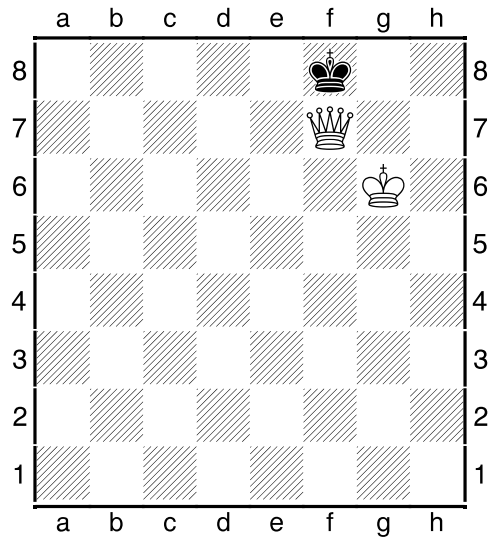
The queen has performed its duty and is now poised to deliver mate as soon as the white king appears on the scene. Play might continue:

**7...Kg8 8.Kf2 Kf8**

The only danger to White is the potential for him to carelessly deliver stalemate. Once the king is trapped on an edge there is no point in restricting its possibilities further. For example, after 8...Kh8 White should continue with his plan of bringing his king up so that the queen can be placed between the two kings to deliver mate. Instead here 9.Qf7?? would be a disaster. Black has no legal moves and hence it is stalemate and White only gets the half point rather than the full point.

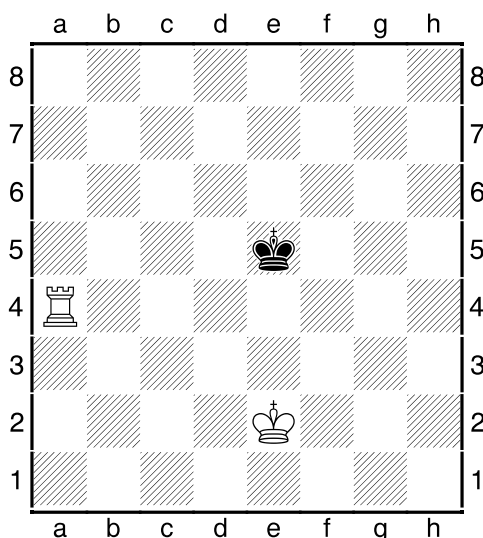
**9.Kf3 Kg8 10.Kf4 Kf8 11.Kf5 Kg8 12.Kg6 Kf8 13.Qf7 mate**

**TIP:** The most common type of checkmate involves a queen ending up next to an enemy king (usually on an edge) but with a piece protecting it so that her majesty can't simply be taken. The defending piece here is of course White's king thanks to the rule prohibiting two kings moving next to each other.



## Checkmating with a King and Rook

The technique here is similar to that with a king and queen in that the procedure involves forcing the defending king to an edge.



### **1.Ke3**

White correctly activates his king as unlike the queen the rook can't force the enemy king back on its own.

### **1...Kf5 2.Rb4**

It is important to realize that White needs to play a 'waiting move'. A waiting move is effectively passing.

Regarding 2.Kf3 Ke5 3.Ke3 Kf5 4.Kf3 obviously there is no point in oscillating the kings. White wants to win and can only successfully give the check to force the enemy king back when the two kings are directly opposed.

### **2...Kg5 3.Kf3 Kh5 4.Kg3**

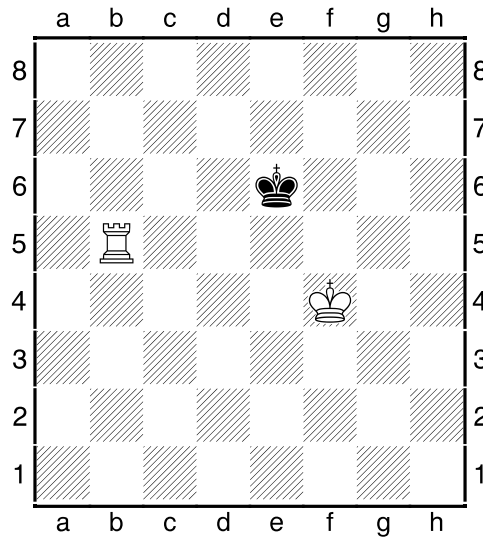
In the last couple of moves, White has chased the black king to the side. He has now run out of squares to run to and so must return.

The technique that is used in this example is an instructive one but after you have played through it you may wish to return to this point and observe that 4.Rg4 is even quicker as the black king is now trapped on the side immediately. Now the game might end via 4...Kh6 5.Kf4 Kh5 6.Kf5 Kh6 7.Rg1 (the waiting or passing move that you should now be familiar with) 7...Kh7 8.Kf6 Kh8 9.Kf7 Kh7 10.Rh1 mate.

### **4...Kg5 5.Rb5+**

When the kings are directly facing each, check the king along the rank as the defending king is unable to go forward.

### **5...Kf6 6.Kf4 Ke6**



### 7.Rh5

Needless to say as before 7.Ke4 Kf6 8.Kf4 Ke6 9.Ke4 Kd6 10.Kd4 Ke6 11.Ke4 is not very constructive, as the black king constantly dodges its opposite number. Instead a 'waiting move' or 'passing move' is required again with the rook passing on the 'safe side' of its own king (i.e. where the black king is unable to approach and take it).

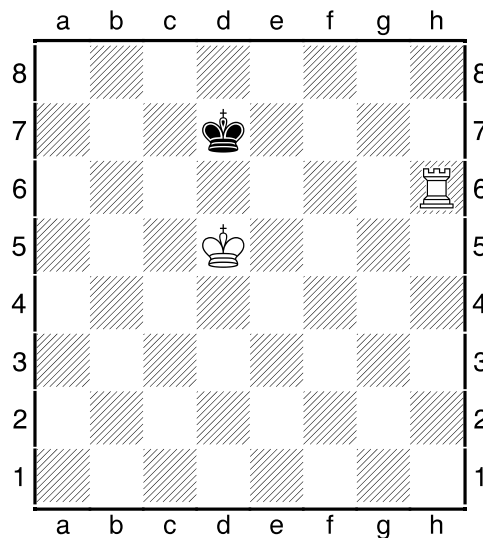
### 7...Kd6 8.Ke4 Kc6 9.Kd4

Yes, the white king chases after the black king knowing that it can't run forever because it would have to rebound off the side eventually.

### 9...Kb6 10.Kc4 Kc6

Now with the kings directly opposed the check is in order to force the black king further back.

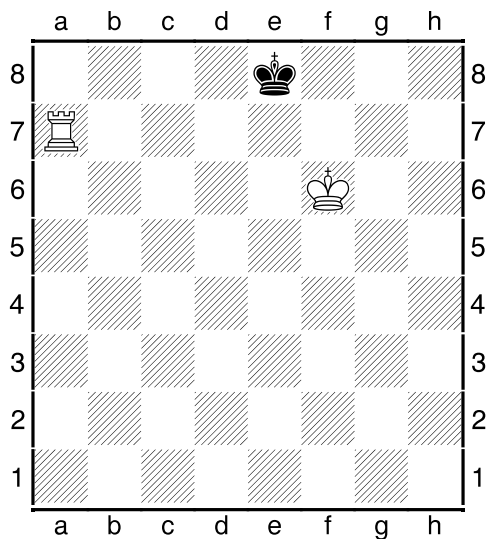
### 11.Rh6+ Kd7 12.Kd5



**12...Ke7 13.Ra6**

Again then a 'passing move' with the 'safe side' here is to the left of the white king.

**13...Kf7 14.Ke5 Kg7 15.Kf5 Kh7 16.Kg5 Kg7 17.Ra7+ Kf8 18.Kf6 Ke8**



**19.Rh7**

The same old routine. The black king's days are numbered!

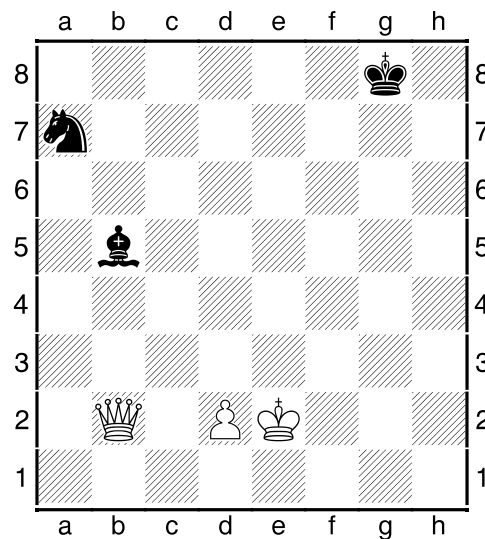
**19...Kd8 20.Ke6 Kc8 21.Kd6 Kb8 22.Kc6 Ka8 23.Kb6 Kb8 24.Rh8 mate.**

## The Sacrifice

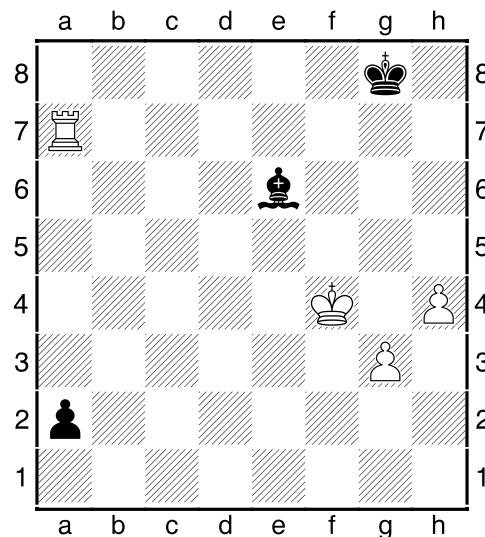
Generally, one should look after one's own pieces, not giving any away cheaply whilst keeping an eye open for gifts that your opponent may give you.

A '**sacrifice**' though occurs when a piece of greater value is deliberately conceded either for nothing or for an enemy piece of lesser value, ultimately for the greater good.

The key is that for a concession to be a genuine sacrifice, the intent must be there with some justification in mind. Too often I have heard juniors claim they have sacrificed a piece when the reality is that they hadn't noticed it was attacked and in fact had just lost it for nothing. Clearly there is a difference!



Not advisable but above 1 Qxb5?? escapes check!



Not advisable but above 1 Rxa2?? prevents a promotion!

The previous two diagrams essentially provide examples of poor decisions to concede material.

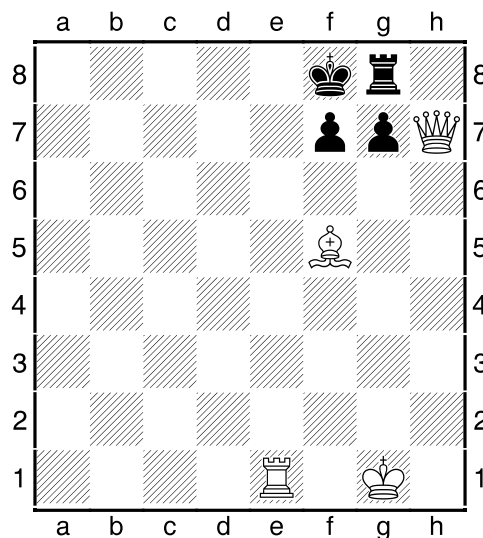
In the first White finds himself in check and would do well to move his king off the enemy bishop diagonal or block the check with his pawn. Taking the bishop with the queen constitutes a serious error, as White loses  $9-3=6$  points-worth of material. In playing  $1 Qxb5$  it could well be that White hadn't noticed that the black bishop was protected by a knight. Even worse! Either way blundering a piece is NOT the same as sacrificing it!

I always advocate **looking out for checks** in case a good one comes along. In the same way I would recommend always **looking out for ways to attack your opponent's queen** and to check that your own queen is NOT in danger before playing the move you are about to. This does NOT mean that you should always give a check or attack a queen whenever you can but rather that you are always aware that such possibilities exist. That way you will never be hit by a surprise checkmate or blunder your queen and you will never overlook a good opportunity.

Obviously the above tip involves discipline and the investment of time but good chess is not played quickly.

In our second example it is true that the black pawn on a2 is just one square from promotion. However, the active white rook has that situation well under control. Indeed, as you will soon learn, **rooks like to be behind passed pawns**. If Black attempts to turn the pawn into a new queen or any other piece, then the rook could take it free of charge. There is therefore no need to hit the panic button and concede the rook for the pawn. Instead, White should concentrate on advancing his own pawns with or without the use of his king.

Either way  $1 Rxa2??$  couldn't really be described as a 'sacrifice' but below brings our first example of this important concept.



If we took the above position to be a puzzle, then the question might be 'How can White to play give mate in two'?



First up in case you didn't know, mate in two means that White will move, Black will respond and then White will give checkmate on the next turn. Beginners frequently misunderstand that, incorrectly assuming that instead White will get two moves on the trot. That unrealistic scenario is most certainly NOT the case.

The solution to the puzzle is:

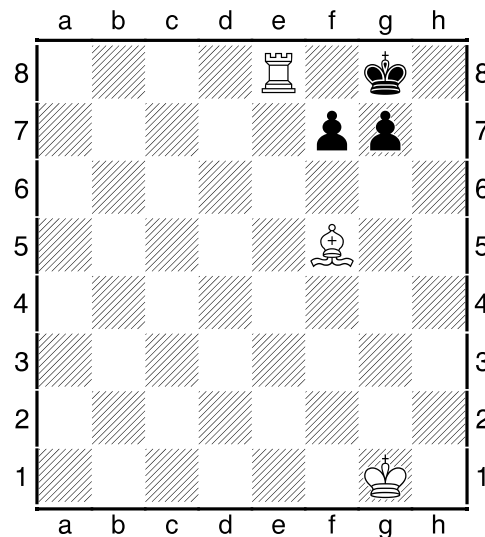
**1 Qxg8+**

The white queen sacrifices itself for the black rook.

**1...Kxg8**

Black's only option was to take the queen. Material-wise he has gained  $9-5=4$  points-worth of pieces. Unfortunately, there is something more relevant than that.

**2 Re8 mate**



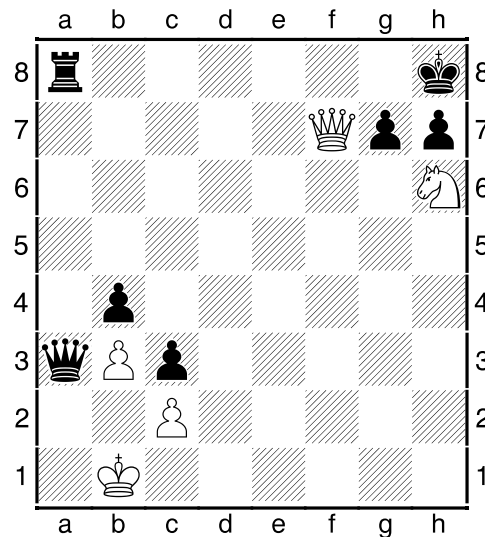
The material situation is irrelevant when there is checkmate (as shown above) on the board. Clearly the sacrifice of the white queen was a perfectly sound and good idea.

The objection that I have to problems that you might see in puzzle books or newspaper and magazine articles is that often there is a mate in two or three to solve when in fact one could win easily (if more slowly) through more standard means.

**Remember there are no prizes for winning a game as quickly as possible!**

Far more useful are situations where one side may appear to be struggling or seemingly only equal or slightly better. Then a sacrifice or combination to achieve checkmate or a winning advantage takes on far more significance. In truth our last example seemed like overkill. Granted it was a neat combination, but the queen sacrifice was hardly required to ensure victory. If White had just played simple chess and in the course of play even swapped off rooks, then completely risk-free White could have gone on to win by delivering checkmate with the king and queen, with the bishop also on hand to help out.

The following example is a far more critical situation:



It is White to play in the position above and Black is up on material and specifically threatening both 1...Qb2 mate and 1...Qa1 mate.

There is no way to way to deal with those threats but if White sticks to my earlier advice and looks out for checks then he will find the following combination:

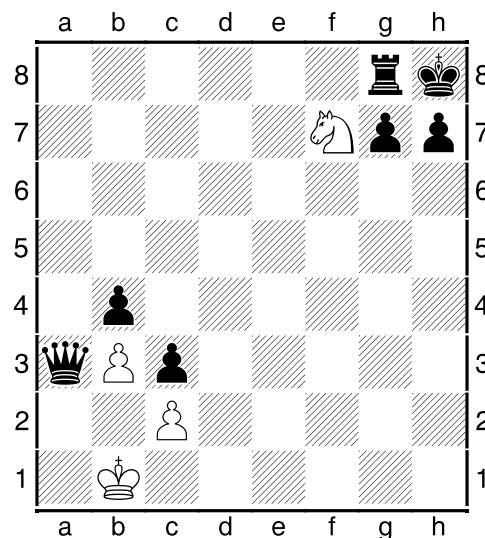
**1 Qg8+!!**

As the black rook has this square covered, this definitely counts as a queen sacrifice.

**1...Rxg8**

1...Kxg8 would count as an illegal move, as the white knight covers g8 and of course the black king cannot move into check.

**2 Nf7 mate.**

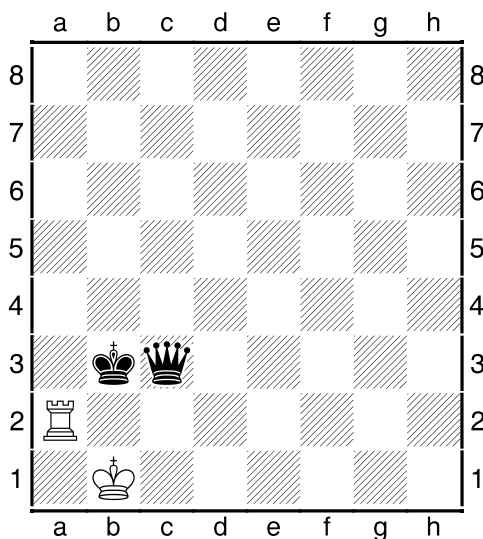


Later you may recall that this is our first example of ‘smothered’ mate in which friendly pieces next to one’s own king prove detrimental. A check from a knight cannot be blocked and the black monarch is unable to move anywhere because the rook and two kingside pawns are in its way.

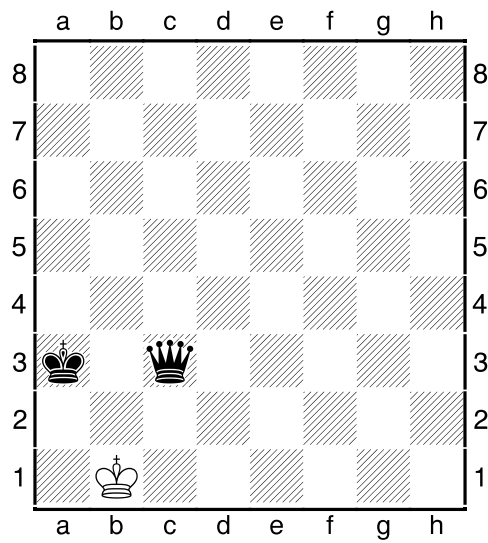
### Tips on Stalemate

When closing in to deliver checkmate, always make sure that, if you are not checking your opponent on that turn, they have at least somewhere to move. Basically then, BEWARE stalemate.

In fact, stalemate tricks can occasionally come to the rescue. Take the position below:



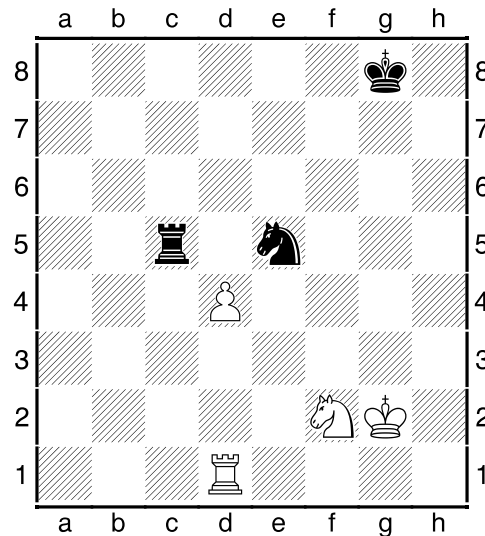
White is a queen for a rook down and appears to be in a spot of bother with  $1...Qe1$  mate one obvious threat. Instead of throwing in the towel though White could employ the rook sacrifice  $1\ Ra3+$ ! The only way for Black to avoid losing his queen is to accept the offering with  $1...Kxa3$  but the resulting position (viz. overleaf) is stalemate and instead of losing the game White will have obtained a draw and a possibly valuable half-point.



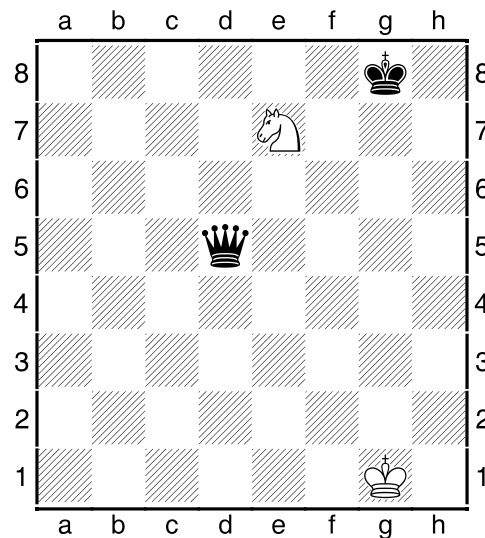
Above, with White to play, it's stalemate!

## The Fork

A fork occurs when a piece attacks two or more enemy pieces at the same time and, when referred to, the implication is usually that something is to be won as a result. Any piece is capable of forking and below are a couple of basic examples:



A pawn fork



A knight fork

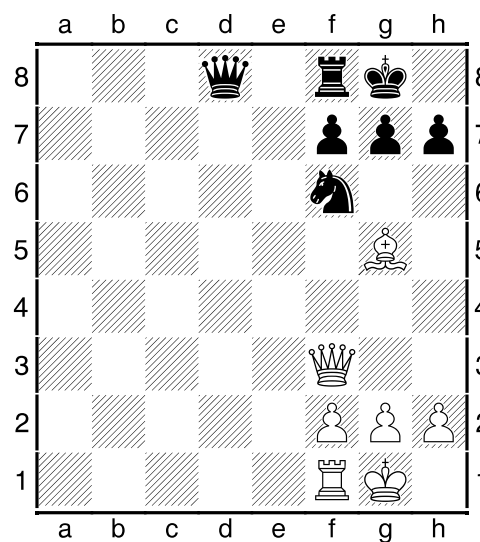
In our first example, the white pawn on d4 attacks two of Black's pieces. As there is no way to escape the fork by giving check, Black must choose which bit to concede. Usually one would opt to preserve the piece of greater value (in this case the rook).

Our second example demonstrates a knight doing what it is famous for; forking! Here the recipients are the black king and queen and, as it is check, Black has no decision to make as to which piece to lose. He must move his king after which the happy white knight will gladly capture the black queen.

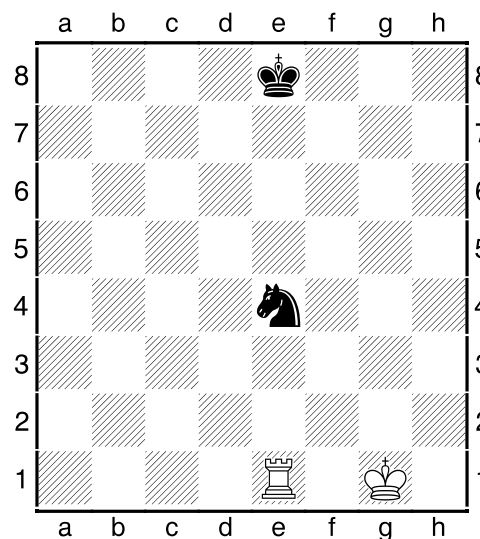
**NOTE:** A **family fork** is when a knight is attacking the enemy king (i.e. check!), queen and rook all at the same time and it is a very enjoyable experience!

## The Pin

A pin occurs when one piece pressurises an enemy piece along a rank, file or diagonal. If the enemy piece were to move off the line, then the attacking piece would find itself hitting a different enemy piece of greater value along the same line. Although moving the first attacked piece may seem silly from a materialistic point of view, if that second in line piece was a king then of course the first piece is simply not allowed to move. Anyway this may sound trickier than it is and in fact everything is made simpler by a couple of illustrative examples:



Above the bishop pins the knight to the queen



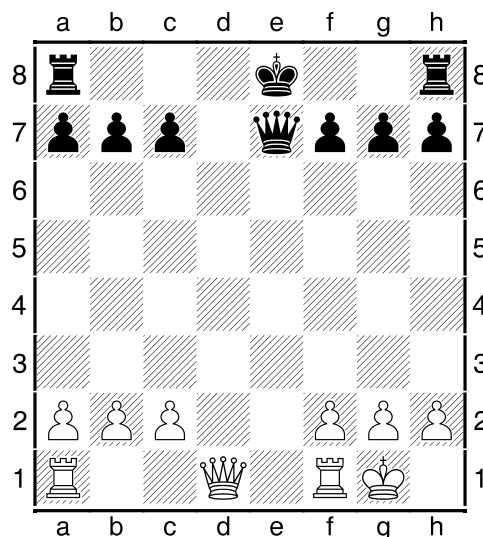
Above the rook pins the knight to the king

In our first pin example we see a fairly common scenario of a bishop pinning an enemy knight to a queen. There is nothing particularly spectacular about the position but the obvious feature is that Black doesn't want to move the knight yet or else it will be the end of the road for her majesty. In order to free up the steed Black will either have to move the queen off the g5-d8 diagonal or else set about forcing the white bishop away.

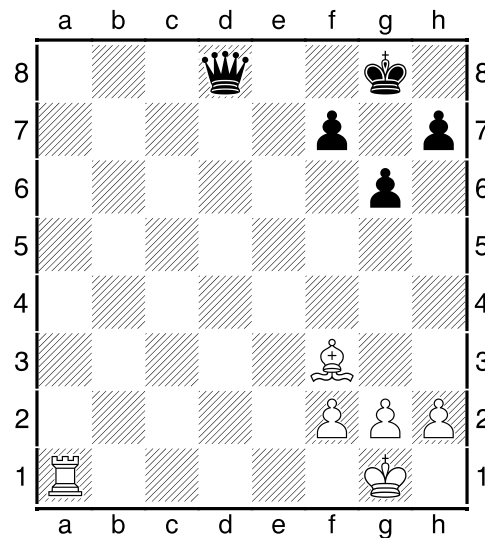
**NOTE:** Escaping from a pinned situation is known as '**unpinning**'.

Our second example is however rather bad news for the black knight. The white rook 'pins' it to the black king along the e-file. As it can't move away, as that would put the king in check, White is set to capture the steed next turn.

I frequently see the illustrated scenario below in lower level games. Black has made the mistake of not castling and has made things even worse by parking his queen in front of his king. On the move White could punish him with **1 Re1** pinning the queen to the uncastled black king and therefore guaranteeing a gain of  $9-5=4$  points-worth of material.



The black king and queen are vulnerable



Watch that back rank!

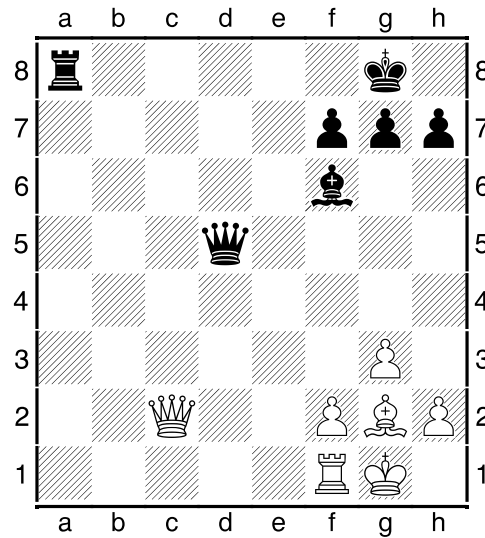
In our final example the black king has previously castled but if it is White to play he could again exploit the fact that the black king and queen are on the same line (this time a rank) with **1 Ra8**. Note how White's bishop guards that square and if that move occurred then the fact that the black queen is pinned would mean that he would secure the capture of the queen. Obviously Black could get a rook in return but if instead it was him to move then he would do well to deal with the threat. As he earlier employed the pawn advance ...g6, he isn't in danger of being back-rank mated. Therefore, he could use the escape square now by advancing his king to g7. That and a queen move off the back rank would avoid the dangerous pin, thus leaving the queen to fight on.



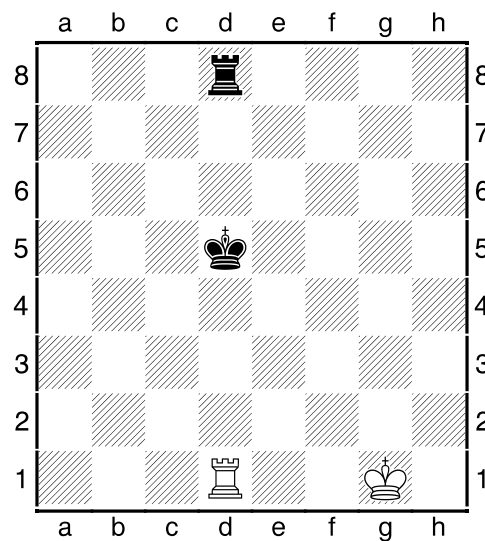
## The Skewer

I always view a skewer as a kind of inverted pin. Basically a skewer occurs when one piece attacks an enemy piece along a line and if that enemy piece was to move off that same rank, file or diagonal, then the attacking piece would hit another enemy piece of equal or lesser value.

Again pictures tell the story better than words:



The white bishop skewers Black's major pieces



Rook takes rook is inevitable!

In our first skewer example the black queen is attacked by the white bishop. When it moves, the bishop will capture the black rook located on the same g2-a8 diagonal.

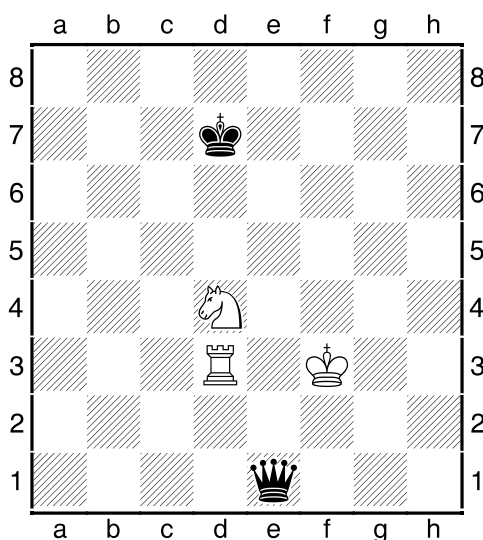
Even if Black wins the bishop e.g. after 1...Qd8 2 Bxa8 Qxa8, then White will emerge the **'exchange'** (a rook for knight or rook for bishop) up.

In the above position though rather than netting 2 points (5-3), White will secure a full 5 points. Black is in check and when the king moves off the e-file, the white rook will capture its enemy number free of charge.

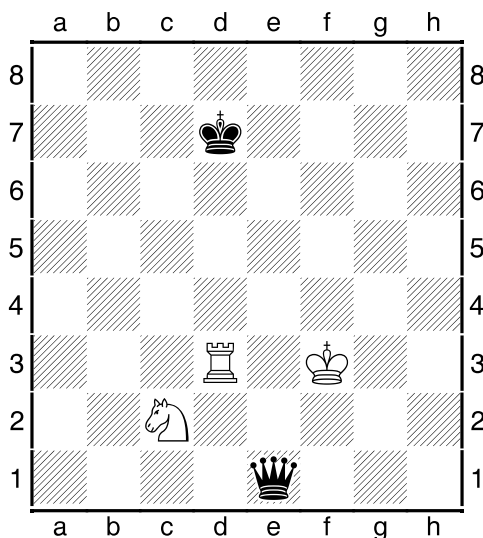
**NOTE:** Often a king is included in the bracket of a piece of greater value although as explained earlier strictly speaking a king doesn't have a price. Some may even say it is of infinite value because of course it can't be taken.

## Discovered Check

I was once monitoring a beginners' group playing chess when a young girl suddenly announced the presence on her board of a discovered check. Very impressed I rushed over to notice that both kings were in check. "We've just discovered that the black king has been in check for a long time", she said! That is of course not what a 'discovered check' is, but sadly the occurrence of having two kings in check does seem quite common amongst absolute novices. Having gone to great lengths to explain about looking out for checks and being compelled to escape check, I'm confident now though that sort of thing won't now happen in your games!



The knight can't check the black king



But the rook can!

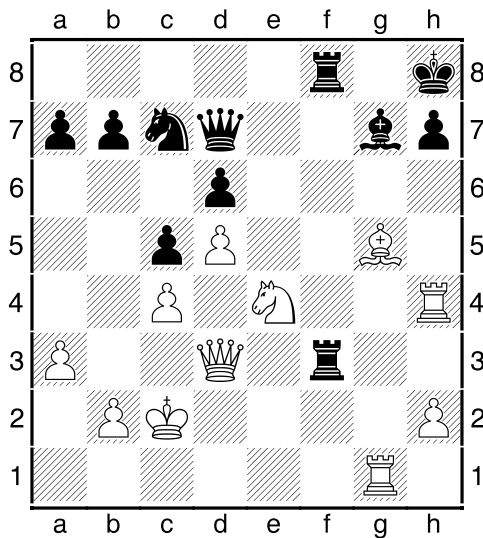
So the first position turns into the next after the discovered check **1 Nc2+**. Yes, although the knight has been the piece to move it is the white rook that gives check. Retreating the knight to c2 rather than moving it anywhere else is especially beneficial here, as after the black king moves out of check, the white knight can capture the black queen.

A '**discovered attack**' is very similar, the main difference being that an enemy piece other than the king is what ends up being attacked.

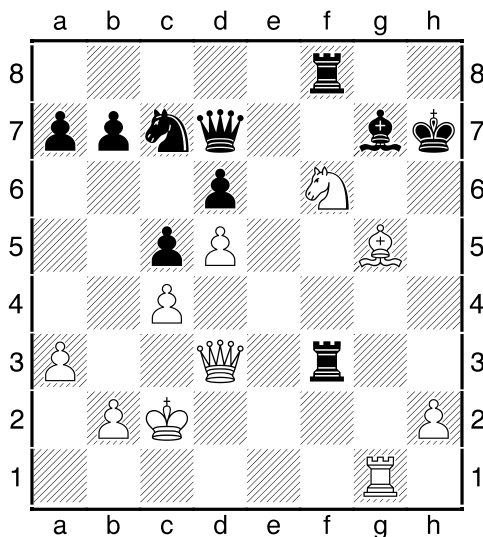
## Double Check

A double check is just as it sounds; two pieces checking an enemy king at the same time. As an example I will use one of my own games:

### Ward,C - Laval,B, French League 2006



Preparing to sacrifice



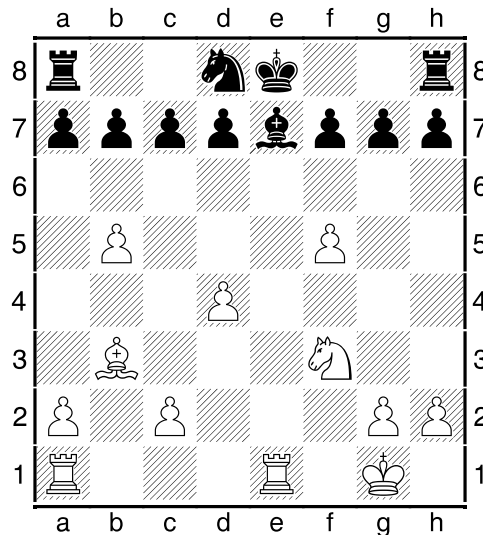
Double check

As White, 26 moves into the game I found myself in our first diagram with my queen attacked by the black rook on f3. I had been prepared for this eventuality though and

confidently responded with the rook sacrifice **27 Rxb7+!** My shell-shocked opponent soon realised that he couldn't accept my offering and so he declined it with **27...Kg8** but lost a few moves later. My justification for apparently conceding my rook for a mere pawn was that after **27...Kxb7** I could employ the double check **28 Nf6+** leading to the second illustrated position. The knight checks the black king from f6 but despite having 3 pieces covering that square (i.e. both rooks and the bishop), Black can't take the knight because he is also in check from the white queen along the d3-h7 diagonal. He can't of course take the queen because he would still be in check from the knight. This is therefore an example of 'double check' and the only legal reply would be **28...Kh8**. The icing on the cake for this combination would then come in the form of **29 Qh7 mate**, fully vindicating my decision to sacrifice.

**NOTE:** Double check is NOT when a king is already in check and another piece suddenly checks it as well, as that would surely imply that an **illegal move** has previously been played. Rather it is when a piece moves to give check, simultaneously uncovering a second piece. So basically it is a normal check combined with a discovered check!

## Doubling up

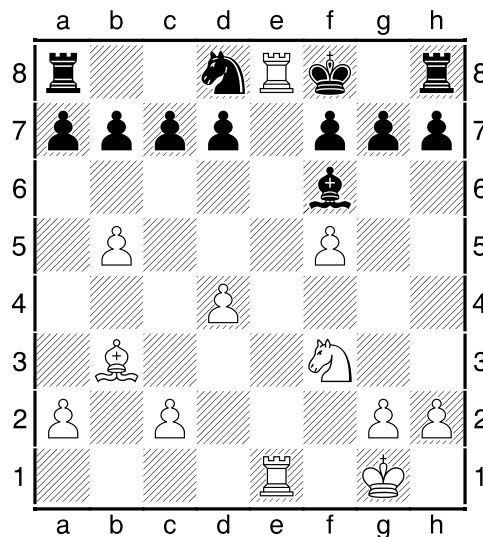


Black has neglected to castle

Above the black king is still in the centre and consequently White can punish his opponent along the e-file. You will be well aware that the black bishop on e7 is pinned to its king but as things stand the monarch protects it once and it is only attacked once i.e. by the white rook on e1. White however intends to change that situation and, after **1 Re3** (or e2 or e4), he will make way for its compatriot to join it on the e-file in order to add extra firepower. If Black does nothing about White's plan, then in a couple of moves he will lose his bishop but in fact a closer inspection reveals that there is little that he can do anyway.

He has evidently neglected to castle and now cannot 'unpin' in time.

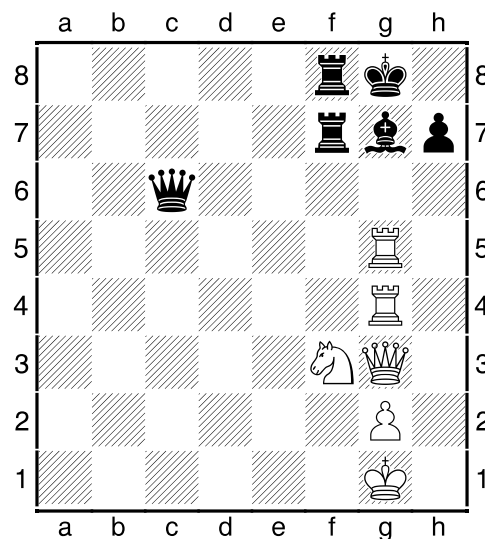
Indeed, below is the position that would be reached after the sequence **1...Kf8 2 Rae1** (doubling the rooks on the e-file) **2...Bf6?? 3 Re8 mate**.



**TIP:** Rooks love open files. They love to access them and either cause some damage along them or else transfer to another useful post via any of the available squares on that file.

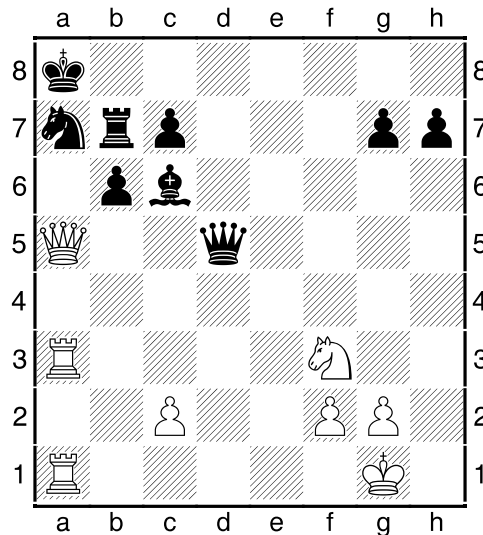
So basically the bishop was pinned throughout, either for legal reasons (i.e. not being allowed to put himself in check) or because moving it allowed a mate in one. Clearly it would have been preferable to have conceded the bishop instead and that's exactly what would need to have happened because none of Black's pieces were on hand to offer support. Black didn't connect his rooks by castling earlier whilst the knight on d8 was a right lemon! Its presence there prevented the king from escaping the e-file by moving to its right whilst the square c6 is scrutinised by the b5-pawn and the blocking option on e6 was also not possible because of the f5-pawn.

If a queen is able to join its rooks on the same file, then that is known as 'trebling' major pieces. There are then three pieces to pressurise but because a queen is more valuable than a rook, remember to take into consideration the order in which they are arranged.



More attack than defend!





The order is wrong!

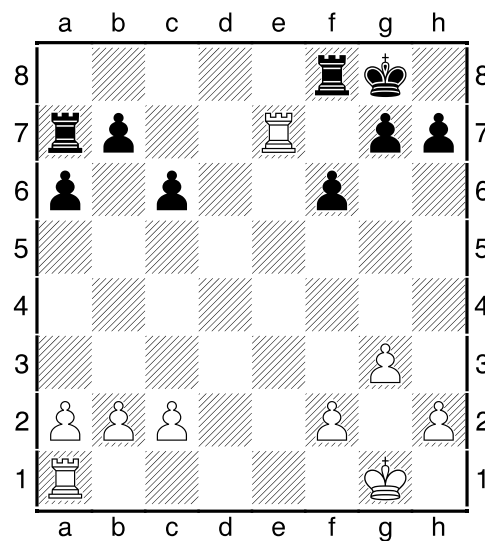
The first diagram is a very simple case of mathematics. White attacks the bishop on g7 three times but it is only guarded twice. After **1 R<sub>x</sub>g7+ R<sub>x</sub>g7 2 R<sub>x</sub>g7+** he will have won a piece for nothing.

The second on the other hand is a little more complicated although still not exactly rocket science! After **1 Q<sub>x</sub>a7+? R<sub>x</sub>a7 2 R<sub>x</sub>a7+ K<sub>b</sub>8** there is no chance of a checkmate using the a8-square because the black bishop guards that well. Although White will have gained two physical pieces for one, taking their values into consideration, the fact is that he has gained a rook and a knight (8 points) for a queen (9 points) and thus actually emerged from the deal with the loss of a point. Instead White should retreat his attacked queen or, because he is after all the exchange for a pawn up, he could swap the queens off on d5. The pin will remain on the a-file and could still prove very useful in the future.

## The 7<sup>th</sup> Rank

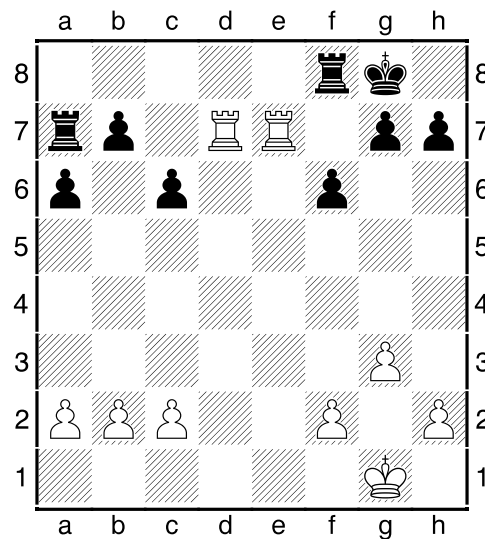
**TIP:** Rooks love to be active and as well as open files, they also love 7<sup>th</sup> ranks.

Below White's e7-rook is extremely active whereas in contrast the black one on a7 is stuck in a passive role of simply defending the b7-pawn. For Black this is a highly undesirable situation and it is often worth sacrificing a pawn with the compensation being to turn a passive rook active.



Alas it is White's move and he can quickly set about activating his other rook. One possibility is to double rooks on the e-file but stronger still is to set about doubling the rooks along the 7<sup>th</sup> rank.

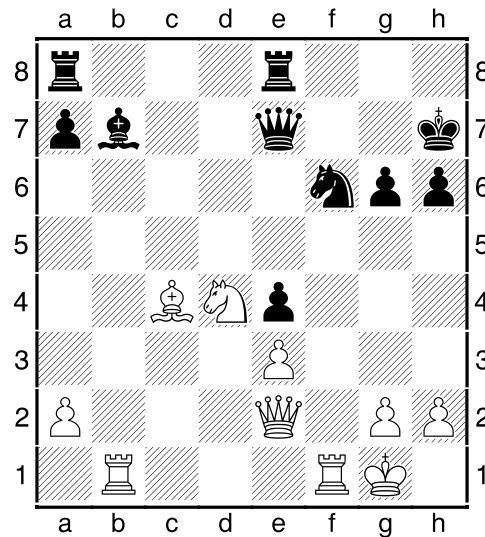
After **1 Rd1** an attempt to intercept White's plan or at least swap off one set of rooks with **1...Rf7** would ultimately fail after **2 Rd8+ Rf8 3 Rdd7**.



Then there would be total 7<sup>th</sup> rank domination with the two white rooks bossing the board. The black rooks can't get any action whereas White's rooks are threatening to Hoover anything along Black's 2<sup>nd</sup> rank. Note that White actually threatens mate via 4 Rxd7+ Kh8 5 Rxd7+ Kg8 6 Rxd7 mate.

### The Overloaded Piece

An overloaded piece is one which is being asked to do more tasks than it is capable of fulfilling. Depending on the position, 'too many' may be just two.



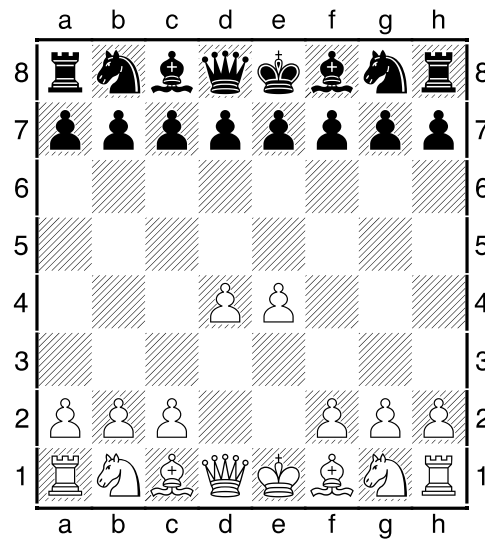
The black queen is overloaded

Above the black queen is being asked to defend both the bishop on b7 and the knight on f6. With that in mind, both 1 Rxf6 Qxf6 2 Rxb7+ and 1 Rxb7 Qxb7 2 Rxf6 would net two minor pieces for a rook.

**TIP:** Two minor pieces (bishops and knights) for a rook mathematically constitutes a gain of just 1 point but in practice it tends to be more valuable than that, particularly in the opening and middle-game.

## General Opening Principles

### 1) Put your pawns in the centre



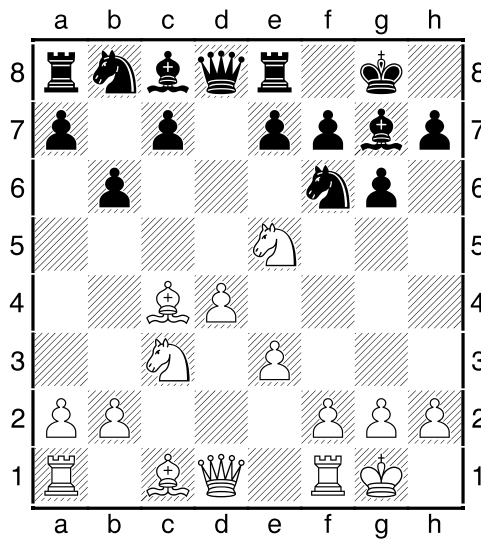
Above White has got both pawns in the centre. This is ideal because now both of the white bishops have free access to the action. The white knights will have no problem emerging too whereas the black knights may feel a little uncomfortable about coming out now given that the white centre pawns could terrorise them.

### 2) Develop your pieces

Although probably the most single important piece of advice (aside from DON'T make mistakes!) that I would offer is '**Look after your pieces and they will look after you**', the simple fact is that they won't do you much good if they are sitting at home! The phrase 'developing a piece' refers to bringing it out to where it does something useful. Try to do that with all your pieces as quickly as possible.

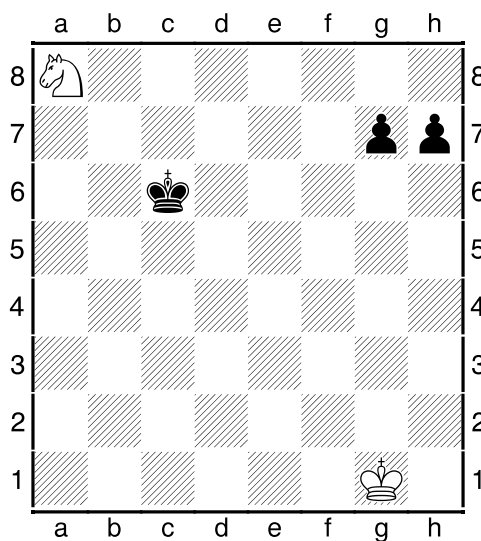
### 3) Knights on the rim are dim

A knight sitting in the centre overlooks 8 squares but one on the edge controls half as many as that or less the closer it gets to a corner.



Above the white knight sits proudly on e5 pressing several useful squares including the typical weak point f7.

It's an endgame rather than an opening but below the white knight is in the worst spot possible and is doomed to capture by the black king.



#### 4) Knights before bishops

This rule is derived from the fact that generally it is clearer where a knight wants to get developed than a bishop and is very much connected to rule 10. It certainly does not mean that you should always bring out both of your knights before a bishop but more often than not it will be wiser to develop at least one knight on its most natural square first.

#### 5) Don't move one piece twice before moving others once

A typical mistake that many beginners make is to 'send a piece or pawn out to battle' to 'see what it can get'! Then when it is lost they 'send out' a second, then a third etc.

In a game of chess, you have an army of pieces and you should try to get them working together. Consequently, don't just focus on one or two, develop your whole army and try to get them combining in perfect harmony.

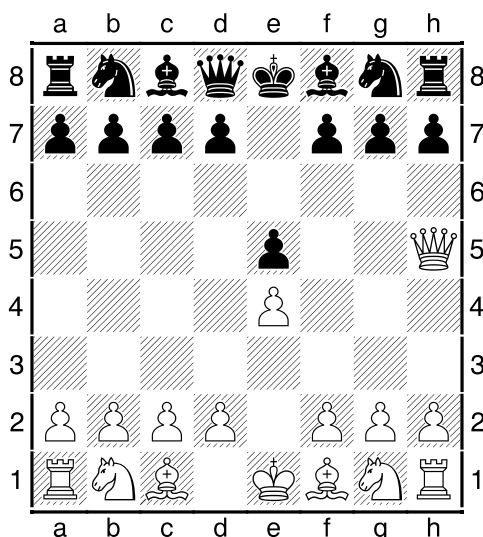
#### 6) Don't bring your queen out too early

There is no doubt that her majesty is a powerful piece but the problem is that when it is challenged by an enemy piece of lesser value (i.e. any piece that isn't the opposing queen) then it may have to run away. As the early part of a game tends to be a busy affair with pieces swiftly being developed, it is more sensible to leave the queen out of the early action rather than using up valuable time with it if you like dodging bullets from the opposing army.

No doubt many have had success bringing the queen out early and delivering a swift checkmate. I always say that if your opponent was going to allow that then the chances are that you would have won the game by normal means anyway. However, if they don't allow that then you are going to find yourself at a disadvantage anyway.

Take the following as an example:

1.e4 e5 2.Qh5?



Breaking our opening rule but attacking the e5-pawn and having designs on f7.

### 2...Nc6 3.Bc4

Threatening the Qxf7 mate that could bring a swift victory!

### 3...g6

It's not to be though as Black has noticed White's threat.

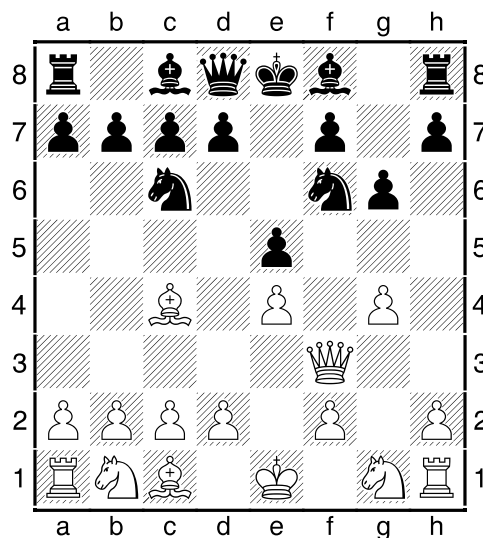
### 4.Qf3

The attacked queen moves. She once again threatens mate on f7 but half of White's moves have been with the queen!

### 4...Nf6

Sensibly developing a piece and of course blocking out the threat to f7.

### 5.g4



A rather transparent plan. White is clearly trying to budge the knight on f6 so as to get the queen down to f7.

### 5...Nd4

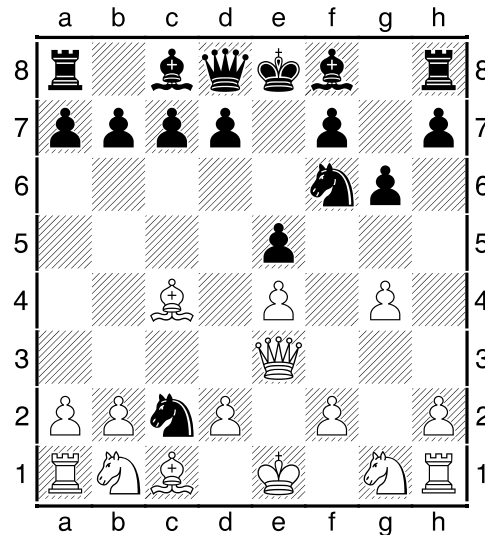
Admittedly this does move the same piece twice before moving some of the others once but is perfectly justified as it gains a **'tempo'** against the white queen. In other words, the white queen is attacked and so must move again.

### 6.Qe3??

Not looking out for checks. Instead, 6.Qd1 would have been safest but leaving aside the fact that Black could simply capture the e4-pawn, the white queen would find herself back home anyway having wasted all that time.



## 6...Nxc2+



A juicy 'family fork'! Having invested so much time in the queen, White will now have it taken!

### 7) **Castle earlyish!**

If the centre is closed (i.e. there are no open lines against the king, making it less vulnerable to checks from the enemy major pieces) then occasionally it is acceptable to leave his majesty in the centre and seek access to the game for the rooks elsewhere. Of course the king likes to be centralised in endgames when it is an integral part of an army but here and now of course the topic is the opening. Generally speaking, tucking the king away into safety and enabling the rooks to be brought to the centre is a good idea and is to be encouraged as soon as possible.

### 8) **No unnecessary pawn moves**

We have already established that it is a good idea to advance your centre pawns in order to free your pieces and gain space but you really have to be sure that you can justify taking time out to make seemingly innocuous pawn moves on the edges.

Escaping or preventing pins might be worthwhile but preventing back-rank mates is a little over cautious and you can easily suffer if you waste valuable time on surplus pawn moves instead of sensibly developing the minor pieces.

### 9) **Think of your rooks**

The most common opening/middle-game error of lower level players is not paying enough attention to their rooks. Sure they would laugh if they saw the likes of:

**1.h4**

'I'm going to try to get my rook out around the side'.

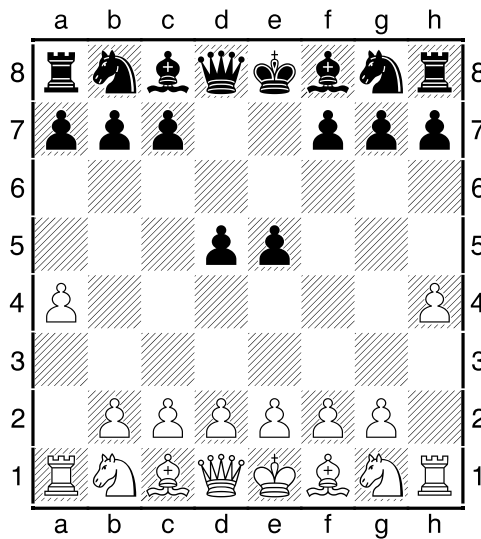
**1...d5**

'Not if my light-squared bishop has a say in the matter'!

2.a4

'OK then I'll swing my queen's rook into play along the 3rd rank'!

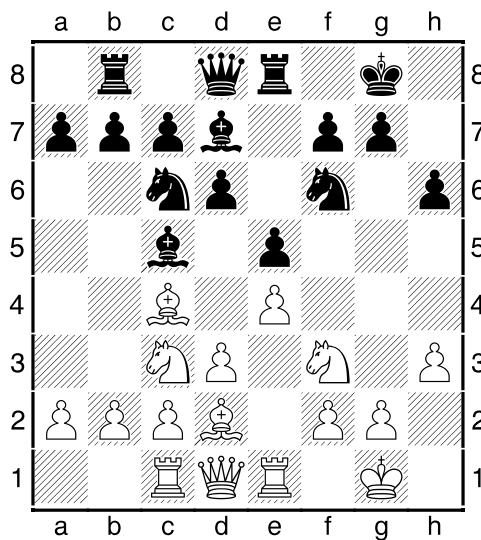
2...e5



'In sensibly placing my pawns in the centre I think you'll find that my dark-squared bishop thinks otherwise'!

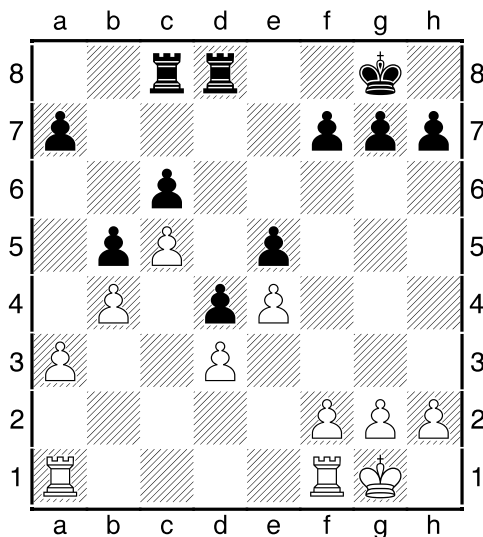
On the other hand, they won't appreciate why the following is flawed:

**1.e4 e5 2.Nf3 Nc6 3.Bc4 Nf6 4.d3 Bc5 5.Nc3 d6 6.h3 h6 7.0-0 0-0 8.Bd2 Bd7 9.Re1 Rb8 10.Rc1 Re8**



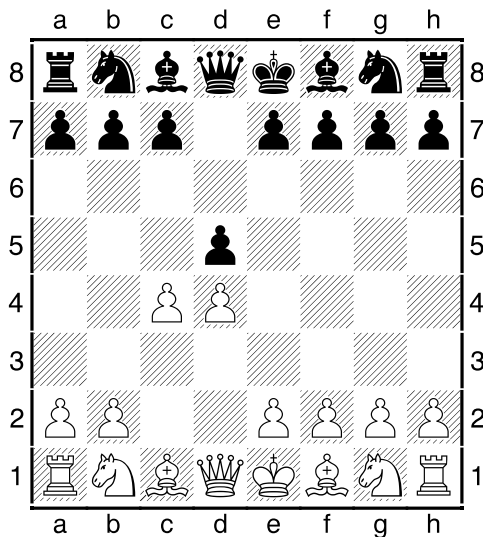
Above all the pieces except the queens have moved but it should be noted that **there is a difference between moving a piece and developing a piece**. In particular, both sides have castled and the rooks have moved but none of them are doing anything particularly useful. There is a blatant lack of open or even half-open files for them to seek any serious action on.

This is a fairly advanced subject but the solution lies in seeking to make a ‘**pawn break**’. This is where a pawn advances to challenge an enemy fixed pawn as illustrated below:



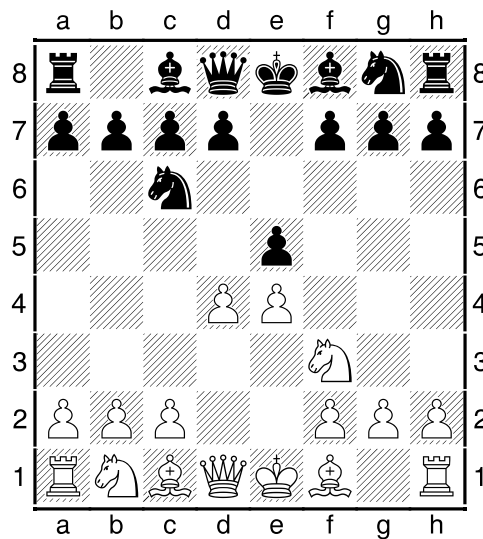
The black rooks aren't doing very much and the white ones can seek to get a lot more action via the pawn breaks f4 or a4. As a direct result of those thrusts half-open or even completely open files might be created to enable a rook or two to penetrate the opponent's position.

One famous example of an early pawn break is the ‘Queen's Gambit’ (1 d4 d5 2 c4) illustrated below:



As ultimately either the black pawn will take on c4 or the c-pawn will capture the d5-pawn then there is destined to be a half-open file created. The aim is then to put a rook or two to good use along those files.

Another example is 1 e4 e5 2 Nf3 Nc6 3 d4. The 'Scotch Opening' is depicted below where there is a definite likelihood that the near future will bring us half-open d- and e-files.



**10) Always make a move that you know that you are going to play before one that you are not sure about**

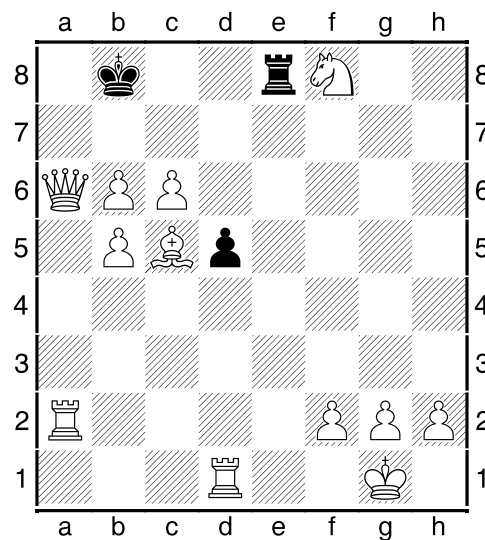
This is pure common sense and applicable throughout a game and merely refers to the occasions in which you have a choice and are undecided as to which move to make. Simply ensure that you give preference to the most likely one (e.g. castles) over a say a more speculative pawn move or knight foray.

### Advice on Practical Play

**WARNING:** The vast majority of practical games do not involve stunning visual tactics and combinations and are instead more mundane affairs. Although it may be nice to sacrifice lots of pieces and to give a snazzy mate, at the end of the day the aim is to win and one should play in a manner that will maximise one's chances of winning.

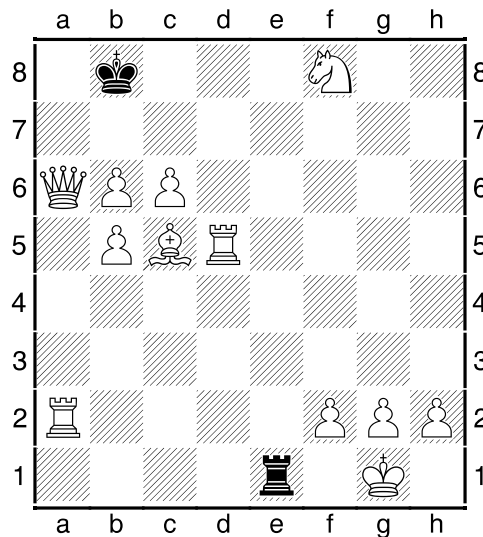
**TIP:** Taking the opponent's pieces will reduce the likelihood of them being able to win and by removing defenders you will increase your chances of being able to deliver a successful checkmate. Don't ignore 'no strings attached' gifts just because the freebie in question may not currently be directly defending the enemy king. Think more long term!

Take a look at the following situation:



Checkmate anyone?

White has an overwhelming material advantage and on the move could employ any of 1 Qa8, 1 Qb7, 1 c7, 1 Nd7 and 1 Bd6 each of which would be checkmate. At any sort of high level chess, frankly Black probably would have resigned some while ago but at a lower level of chess, anything is possible! White has racked up enough of his opponent's pieces but to go that one very unnecessary step further with **1 Rxd5??** would end in disaster after **1...Re1 mate.**



Greed punished!

The resulting situation then is that White had secured 26 points-worth of extra material but none of it was of any use, as Black has achieved a ‘back-rank’ mate and has had the last laugh.

**TIP:** When selecting a move, always consider any checks that you may have available. Furthermore, once you have decided on your move, before playing it, check that your opponent won’t have any good checks available. Basically then always check for checks!

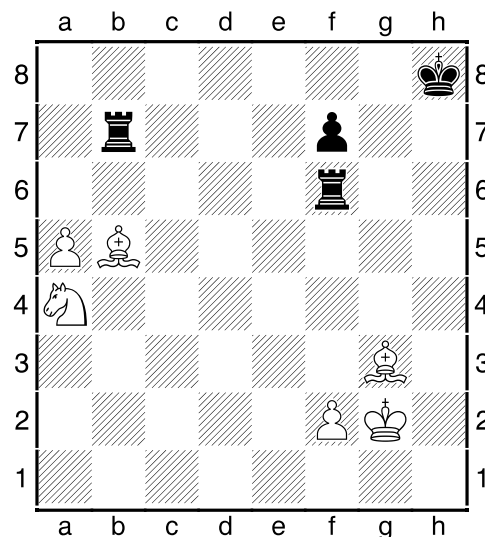
In a variant of our previous example, White may have nudged a kingside pawn up to give his king some breathing space. In a more materially equal situation, preventing any possibility of a back-rank mate and freeing up a defensive piece may have been a good idea. In our extreme example, I suppose 1 h3, 1 g3 or 1 f3 would have ensured that the white king had somewhere to run. If White decided that his own monarch needed to join the action, then the start of a centralisation via 1 Kf1 would also cover the e1-square but simply leaving his d1-rook on the back would prevent an enemy rook invasion. White was extraordinarily careless and would no doubt have been embarrassed by not selecting any of the five available checkmates!

## Attacking and Defending Pieces

By now you fully understand that the ultimate aim in a game of chess is to deliver checkmate and as you progress as a player you will accumulate more weapons and knowledge to help you do that. Hopefully you will eventually get the opportunity to deploy wonderful tactics, thrilling combinations and even brilliant sacrifices to win games and may even feel disappointed when your opponent concedes a game by resignation rather than continue until checkmate is on the board! In truth you shouldn't feel too sad about that, as a win is a win after all!

Don't get too far ahead of yourself just yet though. The key to being a good chess player is not giving away your own pieces and looking for opportunities to take your opponent's. Do make plans but always remember that your opponent will have some too. If you can execute your own ideas whilst thwarting your opponent's ones, then you will be well on your way.

Taking enemy pieces will essentially remove defenders and make it easier for you to give checkmate but chess is not a race to see who can checkmate first. There are no prizes for winning in fewer moves and I would just like to take a little time to summarise the basic concept of defending pieces.



Above the black rook on b7 is attacking the white bishop on b5 and, as it is not defended, it is seriously threatened. In general terms, in the same way that there is an 'A, B, C' of getting out of check, I would say there is an 'A, B, C, D, E' of dealing with a threat to a piece:

A is for AVOID: The threatened piece can move away to a safe square. Here for example 1 Bd3 or 1 Be2 would be okay.

B is for BLOCK: The bishop could be shielded from an attack. Here 1 Nb6 is possible preventing the b7-rook from getting at the bishop. Note that the b6-square is guarded by the white pawn on a5. Although Black has both rooks also hitting that square, following 1...Rfxb6 2 axb6 Rxb6, although Black will have netted both a white pawn and knight for a rook, that is of course still a deficit of 1 point. Not a good deal!

C is for CAPTURE: It would be a handy solution if White could simply take the attacking rook on b7 but in this instance there is no piece available to make such a capture.

When in check, by the rules of the game you have to rid a king of that situation, but as that is not the case when a different piece is attacked, there are two additional options:

D is for DEFEND: Provided of course that the threatening piece is of more value than the threatened one, then the latter could simply be protected. Above the black rook is ready to take the white bishop but after 1 Nc3 now that the white knight guards the bishop, Black won't want to lose the 'exchange' by conceding 5 points-worth of rook for 3 points-worth of bishop.

E is for ENGAGE in.... a counter-attack. Yes, although generally speaking you won't want to be giving away pieces, there may be occasions when you deliberately ignore your opponent's threat, as you can create a greater one of your own. Essentially you may have bigger fish to fry! Note though that even if such an option exists, it is always the more complicated possibility and you need to take time to make calculations to ensure that you have thought things through properly.

Above for example one candidate might be 1 a6. This attacks the b7-rook, which of course would be a nice prize in itself but with this White may clearly be looking to promote this passed pawn. Unfortunately, after 1...Rxb5 2 a7 Ra6 (or 2...Ra5) a successful promotion will not be achieved and so that particular idea will fail.

However, a far better alternative would be 1 Be5!. With this move White would ignore the attack on his bishop in order to set up a 'counter-attack' on the other black rook. Black won't want to lose a rook for a bishop but sadly for him he won't have a choice, as the f6-rook would be pinned to his king. He can either take White's light-squared bishop and lose the f6-rook or else defend the f6-rook (e.g. with 1...Kg7) in which case ultimately (note, as the pin would still be there, White doesn't have to take the rook straight away) he would still lose the rook but this time for White's dark-squared bishop. Either way the counter-attack 1 Be5! guarantees winning the exchange.



## **Tournament Chess**

Many social chess players will be very content just playing ‘friendly’ games against friends and family but others may decide to pit their skills against others in competitive play. Around the World there are numerous chess tournaments that are frequently arranged with categories for events based on either current ability (measured by Grades or Ratings that are soon acquired once an individual has been competing for a while) or age.

In such tournaments there are additional rules that are applied that must be adhered to for fear of punishment. Once a piece is touched then it must be moved unless the intention was merely to nudge that piece to be positioned more centrally on its square in which case it should be accompanied by a phrase such as ‘I adjust’ or ‘the French equivalent ‘j’adoube’. Once you have let go of the piece on its new square then you cannot change your mind and you will have to get used to the concept of chess clocks. Yes, in all serious competitions chess clocks are used to regulate the amount of time that can be spent on a game or even a move. Really not a nice feeling but a player can indeed forfeit a game ‘on time’ if he or she fails to make enough moves or complete the game in an allocated amount of time.

Once analogue, nowadays digital clocks are more common. These enable a competitor to see exactly how many minutes and seconds he or she may have to complete the game. The basic idea is the same with a player’s time being used until he makes a move. Upon doing so, he presses the button on his clock, halting his own time but starting his opponent’s allocation. They then move, stopping their clock and starting the other player’s. This process goes on until the end of the game. Time limits vary between events with rapid play competitions typically allocating the players with 30 minutes each but for so called ‘slow-play’ tournaments that could be 90 minutes or more each. The introduction of digital clocks has also enabled the possibility of giving ‘increments’ where for example a player may be awarded an additional 30 seconds per move. Very popular these days, this effectively helps players avoid ‘time trouble’ where they may leave themselves very short on time to make lots of moves.

Whether you are playing a ‘blitz’ event where players are only given 5 minutes each to complete the whole game or a much slower competition where for example you only need make 40 moves in your 2-hour allocation (before say being given an additional hour for another 20 moves and only then another 30 minutes to complete the game), one rule that stands is that you are not allowed to talk to your opponent whilst their time is ticking away.

As chess is a game requiring great concentration, it goes without saying that it should be (and generally is!) played under quiet conditions.

Either player could win a game of chess, but it could also end in a draw for one of the following reasons, in addition to stalemate, of which the last is especially relevant to the above:

- 1) Insufficient Material: So many pieces could get swapped off that neither player has sufficient left to be able to deliver a checkmate. For example, if there are mass exchanges that leave one player with just his king and the other

with his king and a bishop (or a solitary knight) then the game can be immediately terminated. There is no point in playing on, as however good or bad the moves might be from then on, it would be impossible to reach a position that would be checkmate.

- 2) 50-move Rule: If 50 White moves and 50 Black moves pass without anything being taken or a pawn being moved, then either side can claim (see below) a draw. Please note that the 50 moves are the period between the time when the draw is claimed and the last time before that when a pawn was moved or a piece taken. If for example on move 40 in the game, exchanges were made that left White with a king and a rook and Black with just a bare king, then White has until move 90 to deliver checkmate or else Black can 'claim' a draw under the 50-move rule.
- 3) Threefold Repetition: If exactly the same position occurs on 3 separate occasions then a draw can be claimed. Most commonly this happens when a king is repeatedly checked and the king and the checking piece move backwards and forwards but once again the key is that it has to be exactly the same position (i.e. the same placement of all of the pieces on the board) that occurs on 3 separate occasions. However, please note that the same position does not have to occur on successive occasions. In other words, if exactly the same position occurred 5 and 12 moves previously, for example, a draw by threefold repetition can be validly claimed. In tournament chess, players should be notating the game provided they have more than 5 minutes remaining on their clock or are playing an incremental time limit. To make a claim a player should write down the move that they intend to play on the scoresheet and then stop the clock (i.e. the situation where neither player's time is running down). A tournament arbiter should then be called over and it be explained that once the intended move is played, either 50 moves will have passed without a pawn being moved or a piece being taken (i.e. if the 50-move rule is being claimed) or that the same position is about to be reached for a third time (i.e. threefold repetition). If the arbiter agrees then he will award a draw but beware that if your claim is incorrect then you will be penalised (most commonly in the form of a time penalty), so make sure you are sure!
- 4) By Agreement: At any stage of the game the two players may agree a draw. This is initiated by one player making his move, verbally offering a draw and then pressing the clock (remember you are not supposed to talk to your opponent in their time!). If the other player accepts then they shake hands and the game is registered as a draw. Of course it is perfectly acceptable to decline a draw offer though and please note that it is deemed very unsporting to make frequent draw offers to your opponent and such behaviour could also be penalised.