

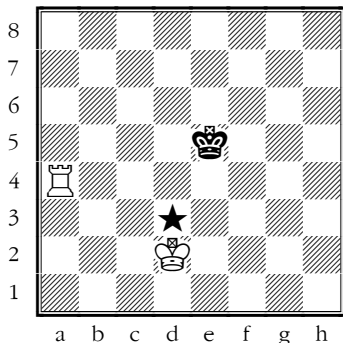
Rook Mates, Zugzwang & King Play

Part 1: Basic Checkmates: King and Rook vs Lone King

Concepts:

- King and Rook play!
- More complex checkmate patterns!
- Introductions to *opposition* and *Zugzwang*
- The concept of a “waiting move”

Step 1, The Pattern: Rook Checks from Afar, King Chases the “Knight’s” Stars

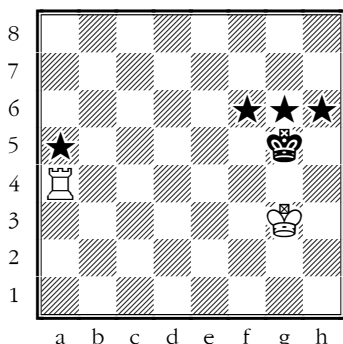


White moves 1.Kd3 – A “Knight’s Check” from the black King...

Unlike the Queen (Lesson 4, Part 1), the **Rook is unable** to force the enemy King to the corner on its own. In this *checkmate pattern*, the King and Rook will need to help each other every step of the way. The “Knight’s Move/Check” pattern does continue however, only this time our King is “chasing the stars”.

The reason we move to d3 – rather than e3 for example – is that it needs to be white’s turn to move as soon as the **Kings take opposition** (which means they are directly aligned. See Lesson 14 for more on opposition). Example: If black were to play 1...Kd5 the Kings would be opposed, and white would immediately play 2.Ra5+, forcing the King to retreat one step closer to the back rank.

The Unavoidable “Opposition” Check

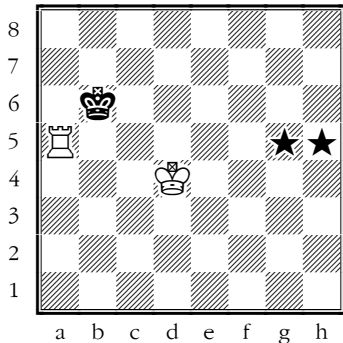


1...Kf5 2.Ke3 Kg5 3.Kf3 Kh5 4.Kg3 and 4...Kg5

Notice that even with “his best running shoes on”, the black King is unable to avoid opposition. Eventually, the Kings do line up, which is the perfect (**and only**) time to give check. After 5.Ra5+, the black King must retreat and move one rank closer to the back row.

This pattern of keeping the rook at a distance, chasing the “opposition” with your King, and **only delivering check** when the King will have to retreat (meaning only when the Kings are directly opposed) is an unstoppable plan. Black only possesses one final trick that white can easily stop...

Step 2, Stay On the “Same Rank”, and Don’t Forget To “Wait”

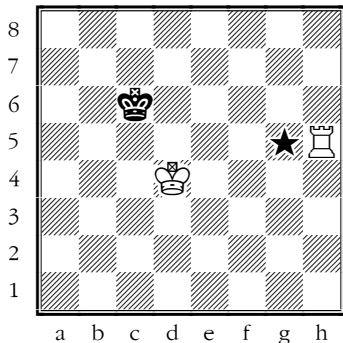


After 5.Ra5+ Kf6 6.Kg4
Ke6 7.Kf4 Kd6 8.Ke4 Kc6
9.Kd4 and 9...Kb6

Eventually, we reach a position where the black King, playing the best possible moves, is attacking our Rook. We must stop our “King Chase” for the moment and find a safe place for the Rook, otherwise the Rook will be captured.

By transferring the Rook to the opposite side of the board (staying on the 5th rank), we’re putting as much space as possible between our Rook and the Black King. After 10.Rh5 (or g5) 10...Kc6 we must be careful: Before making the mistake of 11.Kc4?! – which would allow the black King to, once again, travel to the other side of the board and attack our Rook with 11...Kd6 – we make one simple “waiting move”.

Step 3, The “Waiting Move”

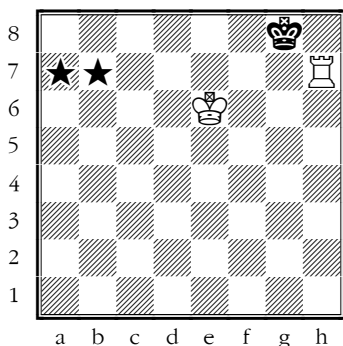


After 10.Rh5 Kd6 white should play the “waiting move” 11.Rg5!

By sliding the rook over one square, we have made a “waiting move” and thereby placed black in *Zugzwang* (which means that black **doesn't want** to move. See Part 2). Now black’s choices are either to run away to b6 - delaying the inevitable, move to d6 - allowing the immediate 12. Rg6+, or voluntarily retreat the King to the 7th rank - which also allows Rg6 – cutting off the 6th rank.

After 11...Kb6 12.Kc4 Ka6 13.Kb4 Kb6 and 14.Rg6+, it is clear that we have a repeating pattern: Chase the King; give check **only** after opposition is achieved; and remember to *swing* the Rook and make a waiting move (making waiting moves repeats) in the critical moment.

Step 3, Reach the Back Rank, and Finish the Job



After obvious moves, the above position is likely

Here we see a position offering a perfect example of the *final sequence of moves*. White, once again, should swing the rook to the **far side** of the board (7th rank). After ...Kf8 white can play the final waiting move (either Ra7 or Rb7) and the black King will be checkmated within three moves: 1...Kg8 2.Kf6 Kh8 3.Kg6 Kg8 4.Ra8(b8)#

Like all good checkmate patterns, this technique works **regardless of the opponent's willingness to cooperate**. However, if black did not have to move white would never be able to corner the King. This situation is known as *Zugzwang*. For more on *Zugzwang*, proceed to Part 2.

Rook Mates, Zugzwang & King Play

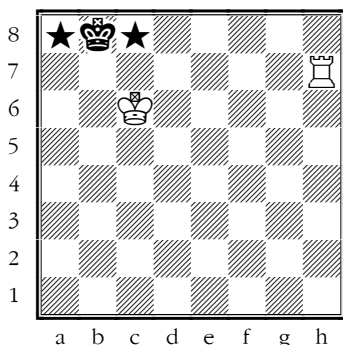
Part 2: Zugzwang Explained and Examples

Concepts:

- Definition and examples of Zugzwang!
- Tricky combinations and *Zugzwang Tactical Motifs!*

Zugzwang: A German word meaning "move-need", literally translated as "move compulsion". This is a situation where every move a player could make causes him/her to lose (or at least worsens their position).

Zugzwang Example 1

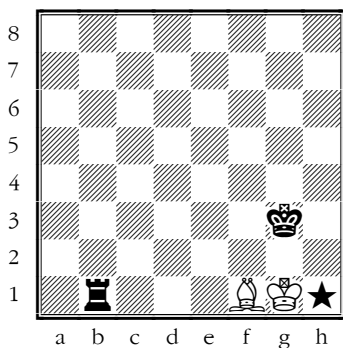


Black is "in Zugzwang", with every possible move being a bad one!

If either player had the ability to pass their turn at will, only moving when it was convenient – numerous positions in chess would become "stuck", reaching a figurative stalemate. In our first diagram we see a perfect follow up example to our previous lesson (Part 1 – Lesson 13).

You can see that if black could "pass the turn" in this position, and white were forced to move again (following the last move, 1.Kc6 with 2. Kb6 for example) black would escape after 2.Kb6 with 2...Kc8! and "run" to the other side of the board – waiting to "pass" again at just the right moment. If black could continue this pattern of only moving when he/she wanted to, the game would never end.

Zugzwang Example 2

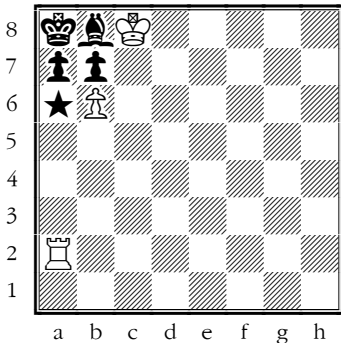


Black played 1...Rb1.

Black's last move *pinned* the f1-Bishop (meaning the Bishop is attacked but can't move - see Lesson 10) to the King on g1. Black's move effectively ends the game, and here's why:

White has no choice but to move 2.Kh1, allowing the immediate 2...Rxf1#. This is a perfect example of Zugzwang, as white's **only legal move is losing** on the spot, yet if a player could "pass the turn", white's King remain perfectly safe, forever shielded by the pinned bishop on f1; therefore the game would never end.

Zugzwang Example 3

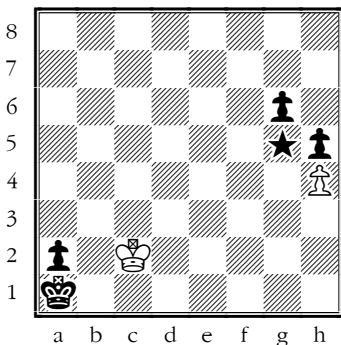


Paul Morphy – 1840s?

In this famous position, white plays 1.Ra6!! – sacrificing the rook but immediately placing black in Zugzwang. Though it may not be the most practical example, it is a “classic” idea – and one that is repeated in a large number of chess puzzle books. If 1...bxa6, then 2.b7# and if 1...B on b8 moves anywhere – then 2.Rxa7 is checkmate.

The “imaginary” or *composed nature* of this position shows the power of playing forcing moves and leaving the opponent with no good options (aka Zugzwang). Again we see that if black could “pass”, the beauty of Morphy’s idea would be lost, or perhaps would have never existed...

Zugzwang Example 4

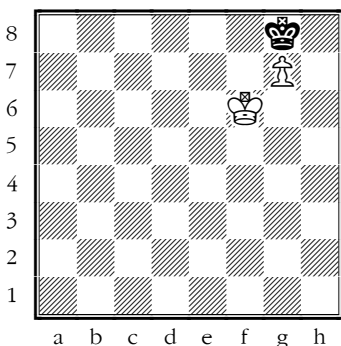


White’s last move was 1.Kc2! – Zugzwang

Here we see that black’s King is (almost) stalemated; black’s only move in our current diagram is 1...g5. White then plays 2.hxg5, and this leads to a **series of forced moves**, with black knowingly walking to his own doom.

After 2.hxg5 h4 3.g6 h3 4.g7 h2 5.g8=Queen h1=Queen and 6.Qg7 checkmate! Though the first position is the most critical, you could argue that black was in Zugzwang for 6 moves in a row, with no way of escaping the ensuing checkmate along the a1-h8 diagonal, black continues to make the “only moves” – knowing that the position is lost.

Zugzwang Example 5



Here white has just played 1.g7! – forcing black to the h7-square

Our final example shows the commonly reached climax of a basic “King and Pawn vs King” ending (Lessons 14 and 15) in which white achieved the goal of eventually forcing his opponent to **give up control** of the all important “promoting/Queening square (g8)”.

After black’s only legal move, 1...Kh7, white plays 2.Kf7 and promotes the g-pawn on the next move – easily winning in the King and Queen vs King ending (Lesson 4 – Part 1). **If black could just “pass” the turn**, black would never have to surrender the g8 or f7 squares. As you can see, a position where one player is in Zugzwang can end the game quickly!

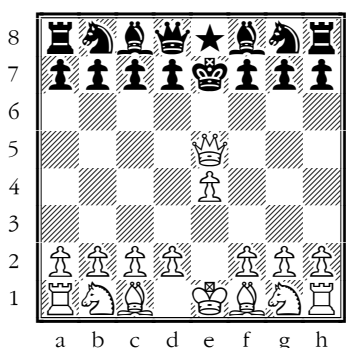
Rook Mates, Zugzwang & King Play

Part 3: King Play, King Power, and King Activity

Concepts:

- King play – When to be aggressive and when to “play it safe” with the King!
- King power and domination over other *short range* pieces (Knights and Pawns)!
- King Activity in the endgame and other basic endgame ideas!

When NOT to use your King – “Play It Safe”, Example 1:

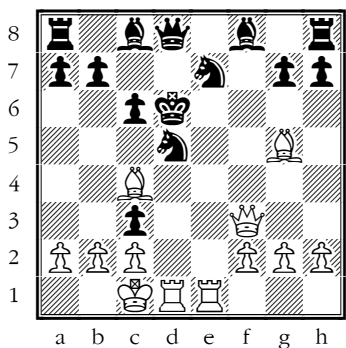


1.e4 e5 2.Qh5 and
2...Ke8-e7?? 3.Qxh5#

The King's role is an important one – both when we are using him and when we are **not** using him. Because “losing the King” immediately results in the loss of the game, keeping him safe is always priority #1! Generally the *opening* stage of the game is the worst time to play with your King – So keep the “Big Guy” home!

As we saw in Lesson 7 Part 1, this is an extreme example of what happens when the King decides to “lead his army”. In this 3-move checkmate, black has just played 2...Ke8-e7??, allowing 3.Qh5xe5 with checkmate. Black should have developed his other pieces, keeping the King safe...

When NOT to use your King – “Play It Safe”, Example 2:

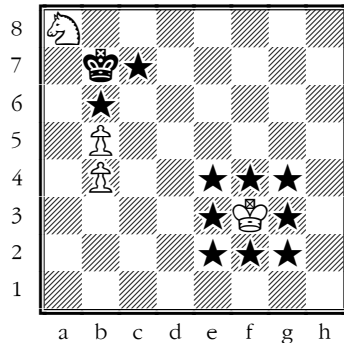


Position reached from the
“Fried Liver” Attack, after
12.Rhe1+ and 12...Kd6

Though specific openings are not relevant for this concept to be understood, here we see an example from a famous opening: the “Fried Liver” Attack! This position clearly displays the problem with sacrificing the development of your pieces and displacing your King for the sake of material. Black's two piece advantage is, amazingly, not enough to safeguard the King or save the game!

Here white can play a number of moves that lead to a significant advantage and the eventual winning of material; however, the most forcing line of play is 13.Bxd5 cxb2+ 14.Kb1 (avoiding any threats from black) 14...cxd5 15.Bxe7+ Bxe7 and 16.Rxd5! winning the Queen on d8, and likely checkmating the black King shortly thereafter...

King Power and Square Control – Example 1:

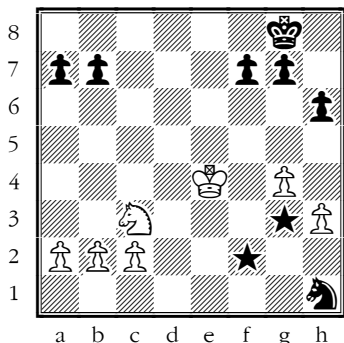


Here we see two examples of the Power of the King!

After seeing two examples of why we **don't** want to use our King too early in the game, we move onto our first position designed to display the King's power. Many players do not realize that **only one** other piece besides the Queen controls every square directly surrounding its current position: **The King!**

In our third diagram we see two examples of the King's power. Firstly, standing alone in the middle of the open board, the white King controls a total of eight squares; Second (as mentioned above) the King's ability to control every square directly surrounding it gives the King power over other short range pieces, such as Knights and Pawns. The Knight is trapped on a8 and the Pawns can't help...

King Power and Square Control – Example 2:

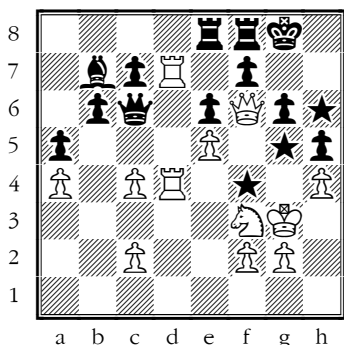


White to play and win...

In the current position white can trap the black Knight on h1 with the correct move. Though we don't normally think of our King as an aggressive, fighting or powerful piece – it is important to know that the King is capable of great things!

After 1.Kf3!, the white King is controlling both the f2 and g3 squares, thus preventing the black Knight from escaping the corner. Regardless of black's response, white will play 2.Kg2 next, attacking the trapped piece and winning it in just one more turn. Black should never have put his "Knight on the Rim" (See Lesson 19 for more information on that).

King Power and Square Control, Rare Aggressiveness with the King – Example 3:

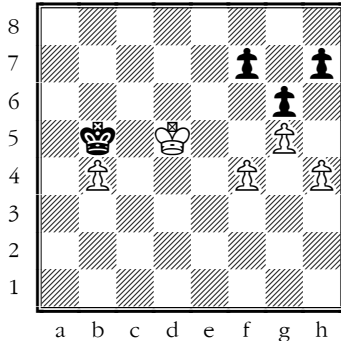


White to play in the game
1-0 Short, N. - Timman, J.
Tilburg 1991

Using your King when the enemy Queen is still in play is risky, and though we don't normally think of using our King when there are still so many dangerous pieces on the board, as we see from this legendary game, **there can be exceptions to this rule!** White to play and win!

In this famous position, English Grandmaster Nigel Short played the move 33.Kf4!!, followed that with 34.Kg5, and before he could even reach the h6-square, protecting the Queen for giving checkmate on g7, his opponent, Grandmaster Jan Timman, resigned...Wow, what an incredibly powerful King!!!

King Play in the Endgame – Activating the King, Example 1:

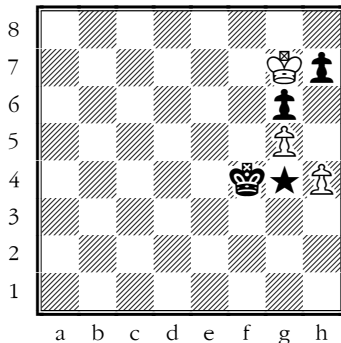


With an **active** King,
white is **winning!**

The *endgame* is considered to be the final stage of a chess game. Generally, we are considered to have reached the endgame stage when the Queens have been traded and only a few pieces remain. In equal (or close to equal) endgames the King's value is very high, and playing **actively** with the King is an absolute must!

Here, because of the active and *central position* (meaning the middle of the board) of the King on d5 – white is winning regardless of whose turn it is to move! Now even if it were black to play and black chooses 1...Kxb4, the white King will go to e5, f6, and start capturing black's pawns...

King Play in the Endgame – Activating the King, Example 2:

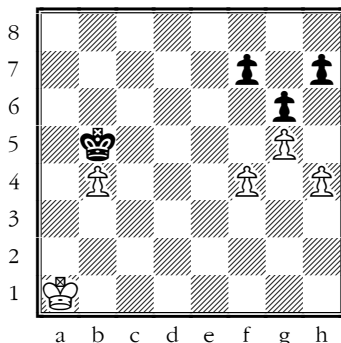


After 1...Kxb4 2.Ke5 Kc4
3.Kf6 Kd4 4.Kxf7 Ke4
5.Kg7 Kxf4 and 6.Kg7

The current position is reached assuming the best line of play following the original position in Example 1. As we can see, white's more active and better-placed King leads to a position where black's King is one move/tempo behind the white King in their race to the kingside Pawns. Black's position is losing by force.

Black continues with 6...Kg4 and the game follows the logical line of 7.Kxh7 Kxh4 and 8.Kxg6! – effectively ending the game as white's King not only protects his g5-Pawn, but will soon clear the way for the pawn to advance up the g-file where it will promote to a Queen. **An active King alone can win an otherwise equal endgame!**

King Play in the Endgame – Activating the King, Example 3:



With a **passive** King,
white is **losing!**

The opposite of the **active and centralized King (Example 1)** is the *passive and slow King*. Everything from this position is the same as our first example except the position of white's King. This should display the final instructive point of Lesson 13: **In an equal endgame, a passive King alone can lose someone the game!**

Even with white to play, we see the following line (note white's King is unable to challenge black's march to the kingside Pawns): 1.Kb2 Kxb4 2.Kc2 Kc4 3.Kd2 Kd4 4.Ke2 Ke4 5.Kf2 Kxf4 6.Kg2 Kg4 7.Kh2 Kxh4 followed by Kxg5 with an easily winning position for black...



Rook Mates, Zugzwang & King Play

Instructor's Guide

When teaching the advanced concepts of the King and Rook Checkmate, Zugzwang and King power/activity it is very important for the instructor to move slowly through each example, not jumping to the next position or concept until the teacher is sure each student fully understands the idea.

It's vital that each child begins to see the patterns in every lesson. Chess is a game of pattern recognition in many ways; therefore, moving onto a harder position without proper knowledge of the more basic version of the same concept is going to become increasingly more difficult as students progress.

Chess study follows a logical “step-by-step” path that requires a player to be prepared for the potential “next phase” or position. So, without the fundamental understanding of those basic positions, a player will find him/herself consistently miscalculating and miscalculating their wants and needs during real games.

In short: Go slow!

Practical Notes and Advice – Lesson 13:

- **Displaying the *repeating concept* of the “Knight’s Move/Check” pattern – *first learned in Lesson 4, Part 1* – can help a student quickly master the King and Rook Checkmate (Part 1).**
- **A creative way to illustrate Zugzwang is to point out that in other board games a player can “lose a turn” or “go to jail” as *punishment*; however, in chess your turn *must* rotate as otherwise positions like Example 1 would be unwinnable. Essentially, Zugzwang prevents players from moving only when they “feel like it.” This may help them realize another area that makes chess different (Part 2).**
- **To further illustrate the power of the King and the importance of King Activity in the endgame, revisit Lesson 13 Mini-Game (Part 3) Pawn Wars: add a king, add a knight without a king, etc., to show the power of king as a “fighting” piece.**

