

# **Learning chess**

**Manual for  
chess trainers**

## **Step 5**

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# The fifth Step

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The books of the Steps Method were published in 1987 as a support for trainers and their students. The manual (teaching) and workbooks (practice) are only two of the pillars of the whole method. Playing games and discussing them afterwards are inseparable parts of it. Especially the latter comes off poorly in chess training. That has unfortunate consequences in many areas. The students cannot apply the acquired knowledge properly in their games, openings and the handling of strategic themes (both areas ideally suited to being introduced during discussion of the games) are hardly dealt with. We can say that in Steps 1 to 3 all important matters have been more or less covered, but in the case of Steps 4 and 5 they have not. For those steps doubling of the number of lessons and workbooks is a breeze. The topics which have not been dealt with yet can be introduced by the trainer during the evaluation of the games. This can be done in the same way as that in which the other material is explained.

The number of students who get to Step 5 is, unfortunately, not that large. We consider the lessons in this Step to be useful only if the students have successfully mastered the previous Steps. This means, among other things, that they should be able to apply the skills and knowledge obtained from Steps 1-4 in their games. If a student has not sufficiently mastered previous Steps, offering new knowledge will be counterproductive. The level of chess knowledge should go hand in hand with the level of chess skills.

Replaying the games of children on Step 5 level (i.e. they have passed their Step 4 exam) is quite disappointing. Students make too many mistakes that actually should not appear at this level any more. They possess a huge knowledge of opening theory. Ten to fifteen moves from theory is no exception. There is nothing wrong if the moves after the theoretical ones are more or less at the right level, but most often it is not the case. The amount of knowledge about opening theory needs to be appropriate to their playing strength.

As far as the trainer is concerned, we assume that he or she is familiar with the didactic approach as used in the first four Steps. Equally important is understanding of the structure of the teaching material. Of course there are gaps in the students' knowledge. Those omissions – a word which sounds a bit nicer – must be eliminated and that is the task of the trainer. But he cannot do that if he has no idea how the material in the previous steps has been built up.

Gaps in knowledge are an issue that cannot be prevented. The condition is that

the trainer realises that they exist and is working to eliminate them. Now that's easier said than done. Smart children especially find it beneath their level to do assignments from a lower Step. A challenge is needed: 0 errors within a certain time (the student can choose the time limit himself or herself). A match with a fellow student is also possible: who is ready first. To prevent guessing the rules are strict: 1 point for a good answer, 5 penalty points for an error.

Concentrating on providing new knowledge only (the current situation) increases the gaps and they quickly become chasms. Such a problem is much more difficult to get rid of. The consequence is that the student loses motivation: "I would never learn that!"

It is good that clubs try to employ an external coach since the club itself has no trainer on a sufficient level. Unfortunately Elo is usually the only criterion. In many cases the wish also comes from the participants.

To meet the needs of a strong trainer a brief summary of the development of teaching material will follow below. In my head a comment from a trainer is still buzzing: "You do not think someone with an Elo of 2200 will still use the manuals of the lower Steps". No, that would be really stupid, wouldn't it?

The manual for Step 5 is the last manual which is intended for group training. However, this does not mean that the chess training should stop after Step 5. Although the manual for Step 6 is intended first and foremost for an individual approach, much of the material can also be used for the purposes of group training.

For chess clubs group training sessions are easiest to organise. It goes without saying that both the books for individual training and the computer course can be used as extra material alongside the group training sessions.



**AIM OF THE LESSON**

- learning a new positional weapon

**PRIOR KNOWLEDGE**

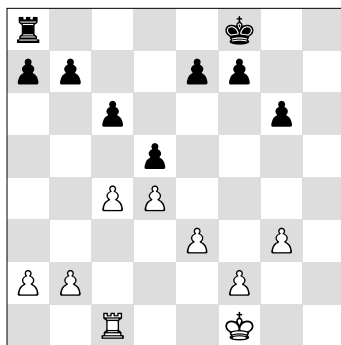
- seventh rank (tactical and positional aspects)

**ACQUISITION****Instruction**

Rooks are the only pieces that, on an empty board, control the same number of squares, irrespective of their position (14). As we saw in Step 4, lesson 14, the rook functions best when placed on the 7<sup>th</sup> rank. In order to get there a rook needs to have space. Specifically, there should not be any pawns in the way. A file on which there are no more pawns is called an **open file**.

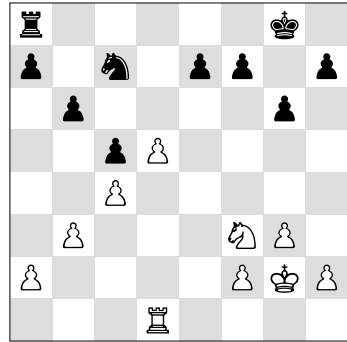
*Creating an open file*

In the diagram (⇒) there is only one open file, i.e. the h-file. Neither side can exploit this file, since the kings can easily expel the rooks from the 7<sup>th</sup> (2<sup>nd</sup>) rank. However, White can open a second file with **1. cxd5**. With this pawn exchange White clears the c-file. When creating an open file it is of course important that the opponent cannot exploit this file. This is not the case here: after **1. ... cxd5 2. Rc7 Rb8 3. Rd7!** (this subtle move is necessary, otherwise Black will play 3. ... Ke8 and 4. ... Kd8) **3. ... e6 4. Rc7** White controls the 7<sup>th</sup> rank. He can now take his time advancing his king.



If we count the number of moves available to the rooks after the first move, then we can conclude that an open file is more than just a

passage to the 7<sup>th</sup> rank. The white rook controls 11 squares, the black rook a mere 4. In addition, the white rook ties the black king to f7 and the black rook to b7.

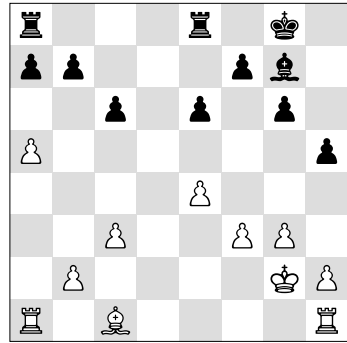


In the diagram (↑) we see another way to open a file. After **1. d6** (Black is more or less forced to take, opening up the d-file) **1. ... exd6** (after 1. ... Rd8 white wins with 2. dxc7) **2. Rxd6**, the white rook is ready to invade the 7<sup>th</sup> rank on the next move.

### Opposing

The usual way to defend against a rook invasion on an open file is to oppose the enemy rook with one of your own rooks.

In the diagram (⇒) this strategy must be used with care. After **1. Rd1** Black should play **1. ... Red8**. If the other rook moves, Black will lose control of the d-file: **1. ... Rad8 2. Be3 a6 3. Bb6**. After **1. ... Red8 2. Be3 Kf8** Black has little to worry about. Now White cannot just give up the d-file with **3. Rxd8+ Rxd8 4. Bxa7?** (4. Kf2!) **4. ... Rd2+**, when Black's rook would be much more active than White's.

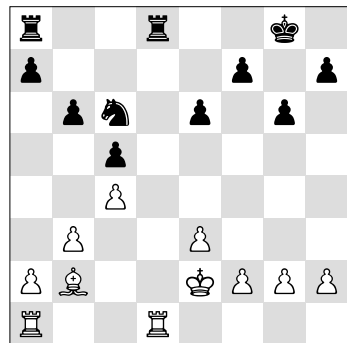


### Eliminating defenders

An effective way to gain control of an open file is to eliminate the defending rook.

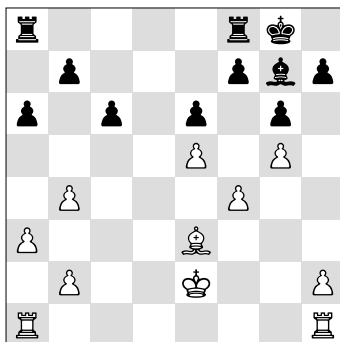
In the diagram (⇓) Black seems to be okay. It would appear as though both sides are controlling the open d-file; however, after the strong **1. Bf6** Black is helpless against the imminent invasion of the white rook. The bishop chases the d8-rook away. Now Black must trade rooks on d1 or move his rook away from the d-file. In either case, White will invade d7, after which Black will face an arduous defence.

When there is an open file in a position, it is



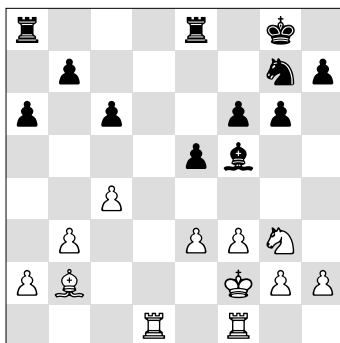
not always a good strategy to occupy this file straight-away.

In the diagram (↑) White must occupy the d-file with due preparation. The obvious 1. Rad1 does not give White anything after 1. ... Rad8 2. Bb6 Rd5, when Black seals off the open file. With the preparatory 1. **Bb6** White prevents Black from opposing rooks. This makes it possible to play a rook to the d-file on the next move, which can in turn be followed by **Rd7**.

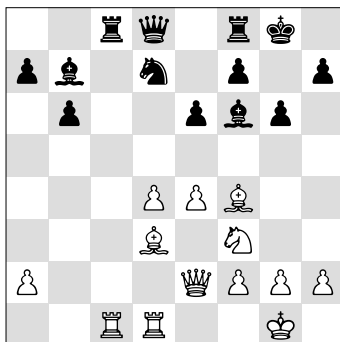


Sometimes a rook invasion on an open file is prevented by a piece that is defending the invasion square.

In the diagram (⇒) the bishop on f5 is such a piece. White gains control of the d7-square by eliminating the defender with 1. **Nxf5**. White should go for this strategy, since doubling rooks with 1. Rd2 is too slow. After 1. ... Rad8 2. Rfd1 Rxd2 3. Rxd2 Bc8 Black successfully holds off White's pieces.



The diagram (↓) shows a position from the game *Geller-Simagin, Moscow 1951*. The c-file is the only open file. It is instructive to see how White quickly gets a firm grip on this file. White first plays 1. **Ba6**. This move does not only eliminate a defender of the c8-square, but also paves the way for an invasion with the queen. Black must take the bishop: 1. ... **Bxa6** (or 1. ... Rxc1 2. Rxc1 Ba8 3. Bd6 and 4. Bb5, suffocating Black; White does not even need to win the queen with 4. Rc8). White continues with 2. **Qxa6 Rxc1** (is forced, otherwise White will win a pawn) 3. **Rxc1 Qa8**. White has conquered the c-file. After the further 4. **Bd6 Rd8** 5. **e5 Bg7** 6. **Rc7** Black lost material, and he resigned after 6. ... **Qe4** 7. **Nd2 Qe1+** 8. **Nf1 Nf8** 9. **Qxa7 Bh6** 10. **Rxf7**.



### Transposing an advantage

One aspect that we have not considered so far is how the advantage of having an open file can be transposed into another kind of advantage. The diagram (♠) provides an appropriate example. White is unable to gain absolute control of the c-file. If White doubles his rooks with 1. **Rac1** Black can defend with 1. ... **Rc5**. Hence, White chooses a different strategy and plays **1. Rc6**. Now Black must either take the rook or hand over the c-file. Taking the rook gives White a formidable passed pawn. Handing over the c-file gives White the chance to advance his pawns at leisure (**1. ... Rb8 2. Rac1 Rhc8 3. Kd4**).

A square on an open file that is supported by a pawn (and which is located in enemy territory) is called an **outpost**. In the above position c6 is an outpost for White, and c5 is an outpost for Black.

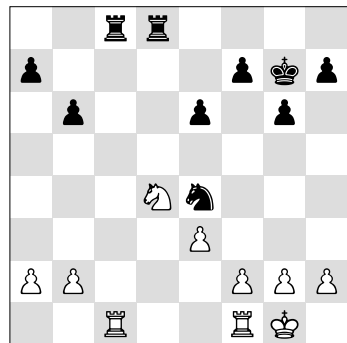
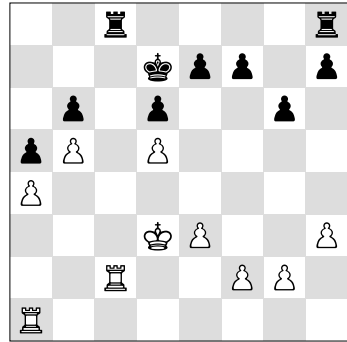
Play the position after 3. **Kd4** to a finish (e.g. in a simultaneous). Preferably twice, once with White and once with Black.

In the case of a sufficient number of students playing normal games is an alternative.

In a subsequent lesson (after a while), repetition is in its place. The position in the diagram (♣) is packed with useful twists on how to make use of an open file and the second rank. Let the students analyse in pairs or discuss the position with suggestions from the group.

Black has the advantage, especially practical, because White needs to play very accurately. Here are some possibilities. The first move is **1. ... e5**. A logical move to try to enter d2. White has 4 knight moves that are worth examining. Two of them protect d2 and two opt for a counterattack.

**A: 2. Nc6 Rd2 3. Nxe5 Rxc1 4. Rxc1 Rxb2 5. f3 Nc5 6. a3 (or 6. Ra1 Kf6) 6. ... Rb3**



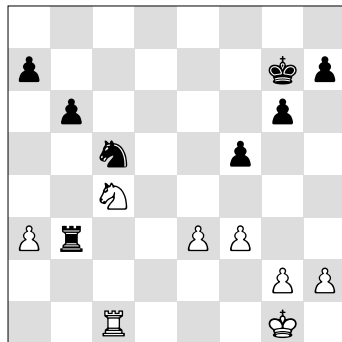


7. **Nc4 f5** (diagram ↑)

and Black brings his king to d5 and plays b5. The pawn majority on the queenside gives some chances.

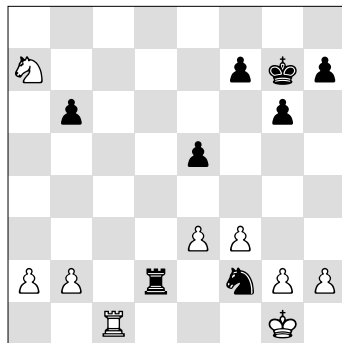
B: **2. Nb3 Rxc1 3. Rxc1 Nd2 4. Na1**

(4. Rd1? Nf3+ of 4. Nxd2 Rxd2 5. Rb1 Kf6 and that position comes back in line C; chances for Black) **4. ... Nc4 5. b4 Na3 6. Nb3 Nc2 7. b5 Na3** and Black wins a pawn and the activity is still present.



C: **2. Nf3 Nd2 3. Nxd2 Rxc1 4. Rxc1 Rxd2 5. Rb1 Kf6** See line B.

D: **2. Nb5 Rxc1** (2. ... a6 3. f3 axb5 4. fxe4 b4 is probably not enough but instructive to play to a finish) **3. Rxc1 Rd2 4. f3 Nf2 5. Nxa7** (diagram ⇒) **5. ... Nd1** (or even 5. ... e4) with chances for Black in practical play.



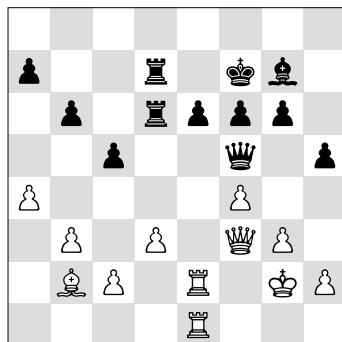
The purpose of this example is gaining practical experience, not finding the absolute truth. There is much to learn about the cooperation of rook and knight. One moment the pieces are active but all of a sudden that can be over.

The same applies to the following example (diagram ↓ - from the game *Mellema-Ikonnikov, Dieren 2015*). First let the students play and only then show the tricky possibilities that the player with Black has played.

1. **Qe4**

An unfortunate moment. That is because the bishop is unprotected on b2. It is correct to wait a move with e.g. 1. Ba1 Rd5 and only then to play 2. Qe4 Qxe4+. That makes it possible to recapture with the rook: 3. Rxe4.

1. ... **Qxe4+ 2. dxe4**



used to your advantage

- try to gain control of an open file
- controlling an open file can be used to:
  - invade the 7<sup>th</sup> rank
  - occupy an outpost

## PRACTICE

### Reminder

◇ *Open files*

### Workbook

□ *Strategy / Open file: A*



Explanation: The topics that are covered in this lesson also feature in the exercises: creating an open file, occupying an outpost and eliminating the options available to the defender.

All positions on this exercise sheet are suitable for playing to a finish, either in simultaneous display format (against the trainer or against a sufficiently strong player) or with the students playing against each other. (In the latter case the students should note down the moves).

Mistake: The correct solution is not found.

Help: Discuss the suggested answer and provide help; the kind of help that is offered depends on how well the student has mastered this lesson's subject matter.

## ANSWERS

□ *Strategy / Open file: A*

1. f4 (open f-file) must give up the a-file.
1. cxd5 exd5 2. Rac1 Rac8 3. Ba6 8) 1. Rc8 Kf8 2. Rxd8+ Rxd8 3. Rc7  
(open file, control file, chase away 9) 1. Nd3 and Black must give up the  
defender) a-file (otherwise b4 is lost).
1. Rg6 (occupy an outpost) 10) 1. ... Rc6 2. Rxc6 Qxc6+
1. Rc6 (occupy an outpost) 11) 1. g4 (1. Bg5 Kg7 2. Bxf6+ Kxf6  
3. Rd7 Rb8 4. c5 Ke6 5. Rc7 f6  
and 6. ... Kf7)
1. ... Nb4 (gain control of c-file)
1. Ba6!; 1. Rac1 Rac8 2. Ba6 Rc5 12) 1. Qe5 (open d-file)
- (eliminate defenders)
1. ... Ng3 2. Rc1 Ne4 and White

# Additional workbooks

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As well as the already existing workbooks, Extra workbooks (all Steps), Plus workbooks (Step 1 till 5), Thinking ahead workbooks (only Step 2 so far) and mix books (Step 1 till 5) have been published. Many students immediately take on the next Step as soon as they have completed the basic workbook of a Step.

Generally speaking, playing strength increases at variable rates. The first thing the students should do is therefore to play more games. The supplementary workbooks allow the students to get more practice at the same level, meaning that they spend more time with the concepts dealt with in a specific Step. The important thing is that the degree of difficulty does not rise too quickly. This enables us to some extent to counter any harm that might be done by many students moving on too quickly to the next Step and finding that the jump has been too great.

## Step 5 extra

A workbook with just a single reminder and apart from that only exercises. The first half of the book contains only exercises on the same themes as appeared in Step 5 or lower. These are useful not only as additional practice but also particularly so as revision.

In the second half the exercises are all mixed up, and so there is no hint as to the theme of each one. These exercises resemble most closely an actual game. Due to lack of space, there are too few of this type of exercise in the basic workbook which goes with the Step.

Furthermore, repetition is of great significance. Revision is necessary: we repeat things so as not to forget them, so don't forget to repeat. Subjects from a previous Step which are not covered in Step 5 need to be addressed again.

The answers can be found at the website: [www.stappenmethode.nl](http://www.stappenmethode.nl)

## Step 5 plus

In this book there is space for:

- new themes
  - king in the middle
  - queen endings

- bishop against pawn(s)
- the eternal pin
- themes to which not enough attention was paid in the basic Step because of lack of space
- treatment in more depth of important themes
  - the wrong bishop
- themes taken from a previous Step, but at a higher level of difficulty
  - zugzwang
  - vulnerability
  - activity
  - pawn endings

We deal with all the themes in 10 Plus lessons. Many of these can be short. The main point is that the students are able to solve the exercises in the correct way. We don't advice to skip the instruction.

## Step 5 mix

This workbook contains exercises with one 'simple' assignment: play the best move. Just like in a real game, you do not know whether you can win or whether you have to defend. The right approach is important. What's going on? Which targets can you exploit? What is the opponent threatening? Is it time to draw? In short, all kinds of stuff.

Apart from 'normal' puzzles the mix book contains thinking ahead positions, the right move(s) must be added. In positions with a multiple choice question the correct circle should be marked. The last eight pages contain mate in two problems. In Manual Step 4 it was pointed out in lesson 11<sup>+</sup>, that solving problems makes sense.

All the tasks could be solved reasonably well if the current Step and the previous Step(s) have been properly taught (i.e. lessons, exercises, practice - playing games and discussing the games).

Unfortunately experience shows that, in spite of the results of those trainers who do work in this way, it is not common practice. Although the mix-exercises cannot replace the trainer, they can help to spot the errors that need to be worked on. The answers indicate the theme of the tasks. If it turns out that the same kind of mistakes are being made frequently, it would be wise to repeat this theme. General skills, such as taking into account the possibilities of the opponent will come to the fore

with a lot of players. Also, the solving approach (finding the best move) is to be improved upon: without a search strategy it will not work if the preceding Steps have not been rendered sufficiently automatic. Solving exercises only is much less useful than many people think (you learn patterns but there is much more to be gained). The nub is, whether the solution is found in a ‘correct’ way and not by picking a random move and trying it out. The result is that effective learning remains at a low level when one thinks of the time spent on such exercises. The most important thing of all is that feedback is necessary (see the Manuals under the heading ‘Workbook ‘ under explanation, mistake and help).

The target is: learning to play chess better and the right approach has to be applied in a real game as well.

## Playing

In many lessons we need to make room for playing, preferably in the form of a simultaneous display. This advice has been given more than once in previous manuals. Unfortunately we see too often that playing is skipped, partly because the trainer cannot always find appropriate positions, or he hasn’t the requisite playing strength. The first point has been dealt with. In this latest edition of the manual, a lot of lessons in the basic part contain new positions to be played to a finish.

When playing positions to a finish we can provide the students with tailor-made material. We can adjust the difficulty to the level of the student and give him or her feedback directly. “This was good, but you should avoid attacking when you do not have enough attacking pieces.” We improve upon their weaknesses through play. The students find playing fun anyway. The nature of the positions is such that they can often beat the trainer in a simultaneous display. It is important that they realise that their playing strength is increasing all the time. This reinforces their motivation and that in turn is necessary to encourage them to tackle even more energetically their study of chess. This again results in longer term improvements in performance. It is all very simple ....

# The Steps



## Books

The following books are available in the 'Steps Method' series:

<b>Manuals for chess trainers:</b>	Step 1, Step 2, Step 3, Step 4, Step 5
<b>Manual for independent learners:</b>	Step 6
<b>Basic workbooks:</b>	Stepping stones 1, Stepping stones 2, Step 1, Step 2, Step 3, Step 4, Step 5, Step 6
<b>Extra workbooks:</b>	Step 1 extra, Step 2 extra, Step 3 extra, Step 4 extra, Step 5 extra, Step 6 extra
<b>Plus workbooks:</b>	Step 1 plus, Step 2 plus, Step 3 plus, Step 4 plus, Step 5 plus
<b>Mix workbooks:</b>	Step 1, Step 2, Step 3, Step 4, Step 5
<b>Thinking ahead workbooks:</b>	Step 2, <i>Step 3</i>

The title represented in *italic* is only available in Dutch.

Updated information can be found at our website:  
[www.stappenmethode.nl](http://www.stappenmethode.nl) (EN, FR, DE, NL)

All books can be ordered from this website for worldwide delivery:  
[www.stappenmethode.nl/en/](http://www.stappenmethode.nl/en/)

## Software

The Chess Tutor for Windows is a series of chess learning software based on the 'Steps Method'.

**Chess Tutor Step 1**, **Chess Tutor Step 2** and **Chess Tutor Step 3** are available as download or as CD. You can first try the Chess Tutor out using a free demo version.



More information at: <http://www.chesstutor.eu/en>