

8. Castling

Objective:

Correctly apply the rules of castling

The primary purpose of this lesson is to teach the rules of castling and the importance of castling as a means of protecting the king from attack. Keeping the king safe is one of the three principles governing opening play. The importance of keeping the king safe should be emphasized by encouraging students to castle early in the game.

Outline of lesson

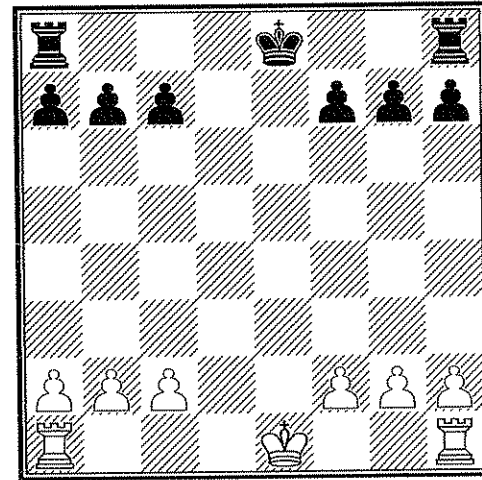
1. Review of the movement of the king
2. Review that the king must be kept safe
3. How to castle
4. When a player may not castle

**PART 1:
REVIEW OF
KING RULES**

**two pieces move
on the same turn**

Ask the students to recite how a king moves. A king may move one square in any direction.

Set up the position on the right. Explain that there is an exception to the rules of how a king moves and that in chess there is one (any only one) move that allows two pieces to move on the same turn. Ask if anyone knows the name of that move.

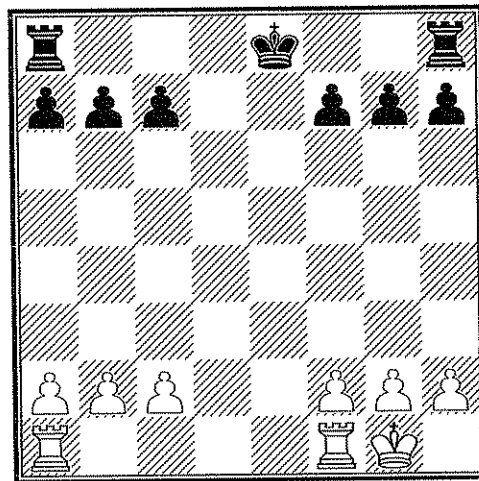


The move is called "castling."
(It may be because of the name that some people mistakenly refer to the rook as a "castle.")

how to castle

Ask for a volunteer to come to the board to demonstrate one way to castle. Ask the student to use the white pieces to castle.

**king has moves
two squares**



The board should look like this when you have a correct answer. (Queen-side castling is also an appropriate answer, but it is rare that a student will castle on that side. A diagram of queen-side castling appears on the following page.)

**rook has
"jumped" over
the king and
landed next to it**

Ask the students how many squares the king has moved from its starting square. The king has moved two squares

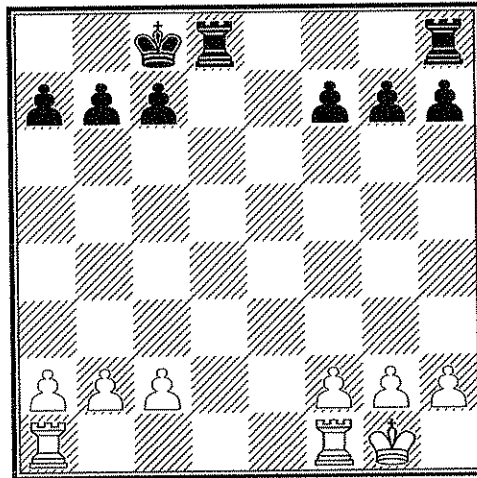
and the rook has moved next to the king on the other side.

All of this has taken place in just one move.

**Second way to
castle**

Now ask the students for a second way to castle, using the Black pieces.

**Queen-side
castling**

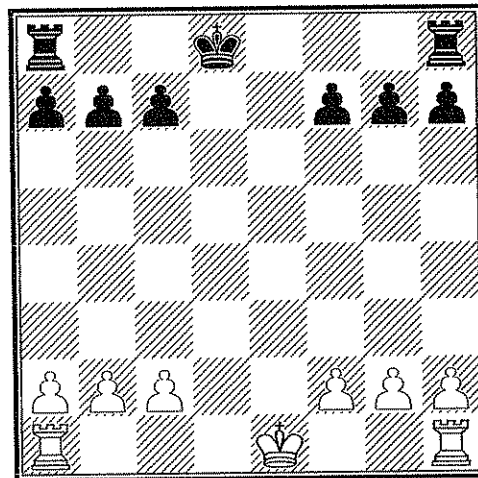


Students may try a variety of patterns, sometimes switching the position of the king and rook, or moving the king three squares towards the rook on the queenside. None of these is correct except for the pattern shown to the right.

As with castling on the kingside, the king moves two squares and the rook “jumps” to the square on the other side.

Ask the students when castling is *not* permitted. There are many such circumstances and none is more important than any other.

**neither piece may
have moved**



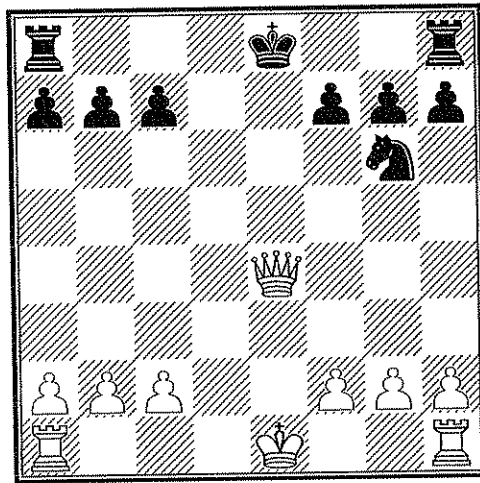
Castling must be the first time the two pieces have moved. In the position to the left, Black will never be able to castle, as its king has moved.

If a piece moves, it may not be used in the castling move that game even if it returns to its original square. If one rook moves, the other may still be used for castling.

In the position above, White may still castle if its king has not yet moved and at least one of its rooks has not moved.

Of course, a player may castle only once in a game, as the king moves as part of castling.

**may not castle
“out of check”**



A player may not escape check by castling. In the position to the left, Black is in check. To get out of check, Black may move its king to d7, d8 or f8 or may block with the knight.

Which move would preserve the right to castle? Blocking with the knight would allow Black to castle later.

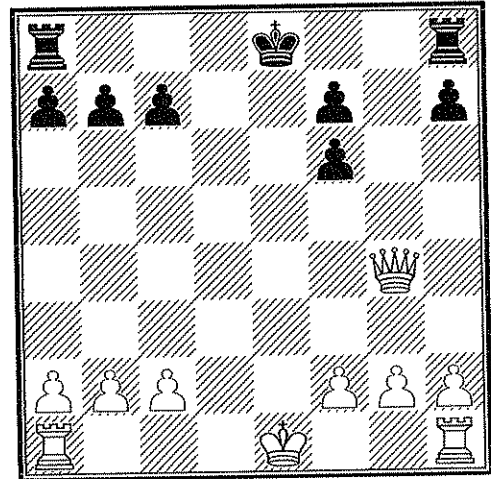
Having been in check does

**having been in
check does not
prevent a player
from castling**

not prevent a player from castling.

**may not castle
into check**

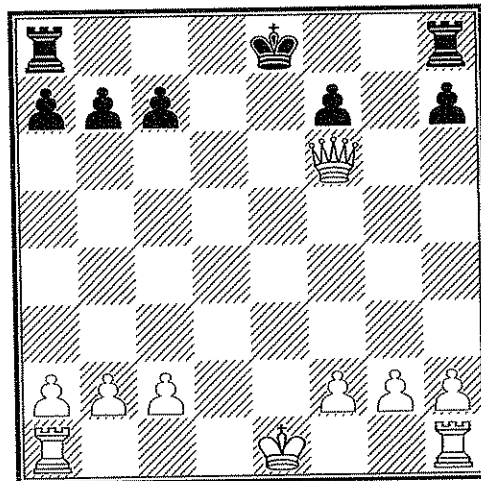
Black may not castle in the position to the right. Why not? Castling either way, kingside or queenside, would place the king in check and that is never permitted.



A player may not castle into check.

There are no exceptions to the rule that a player’s king must be safe at the end of the turn.

**may not castle
“through check”**



Set up the position on the left. Assuming that neither king nor rook has moved, may White castle on the kingside? Yes. May White castle on the queenside? Yes.

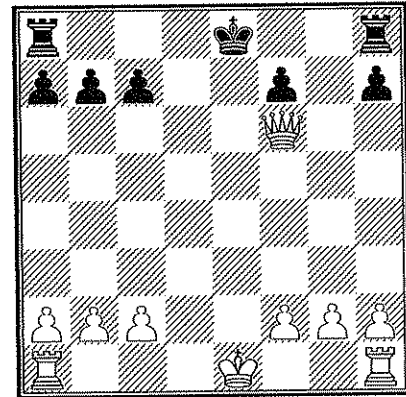
May Black castle on the kingside? Yes. The rook is in danger, but there is no rule against castling when the rook is in danger, only a rule against a player castling “out of check.” A rook may not be

in check, so there is no rule against castling when the rook is in danger.

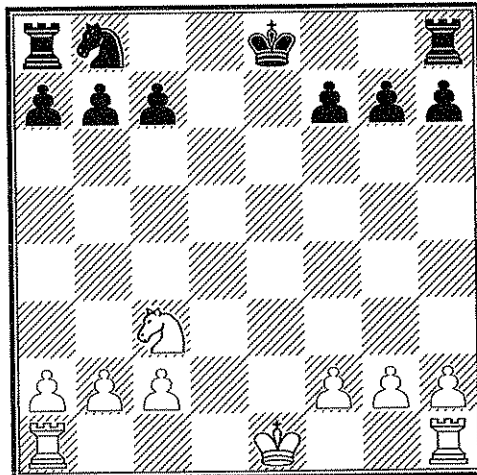
May Black castle on the queenside? No. Because the queen controls d8, and the king would need to pass over that square to castle, Black may not castle on the queenside.

no castling out of check, into check or through check

The rule protecting the king is very powerful. A king may not castle out of check, into check or through check.



nothing may be between the king and the rook



In the position to the left, may White castle on either side? Yes. May Black castle on either side? No, only on the kingside.

The undeveloped Black knight prevents Black from castling queenside, as there may be nothing between the king and rook when castling.

summary

Summary:

Castling involves moving the king and rook on the same move. The king moves two squares towards the rook and the rook “jumps” over the king to the square next to it.

Castling must be the first move for both pieces involved with the move. There may be nothing between the king and the rook at the time of the move. A player may not castle out of check, into check or through check.

notation

Kingside castling is notated as 0-0.
Queenside castling is notated as 0-0-0.