

# **Play the Mackenzie!**

**A Sharp White Attack in the Ruy Lopez**

David Gertler

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## Index of Model Games

Game	White	Black	Chapter	Variation	Year
1	Paul Morphy	Johann Löwenthal	1	5...exd4 6.e5	1858
2	Mikhail Tal	Petar Mejic	1	5...exd4 6.0-0 ♟e7 7.♙e1	1974
3	Pia Cramling	Viktor Korchnoi	1	5...exd4 6.0-0 ♟e7 7.♙e1	1982
4	Francisco Perez	Boris Spassky	1	5...exd4 6.0-0 ♟e7 7.♙e1	1964
5	Henry Bird	Wilhelm Steinitz	1	5...exd4 6.0-0 ♟e7 7.e5 ♞e4*	1866
6	George Mackenzie	Szymon Winawer	1	5...exd4 6.0-0 ♟e7 7.e5 ♞e4 8.♞xd4 ♞c5 9.♟xc6	1883
7	Christopher Yoo	Alan Pichot	1	5...exd4 6.0-0 ♟e7 7.e5 ♞e4 8.♞xd4 ♞c5 9.♞f5	2020
8	Christopher Yoo	Ivan Ivanisevic	1	5...exd4 6.0-0 ♟e7 7.e5 ♞e4 8.♞xd4 ♞c5 9.♞f5	2021
9	David Gertler	Peter Minear	1	5...exd4 6.0-0 ♟e7 7.e5 ♞e4 8.♞xd4 ♞c5 9.♞f5 0-0*	2012
10	Oliver Mihok	Daniel Naroditsky	1	5...exd4 6.0-0 ♟e7 7.e5 ♞e4 8.♞xd4 ♞c5 9.♞f5 0-0	2017
11	George Mackenzie	Henry Hosmer	1	5...exd4 6.0-0 ♟e7 7.e5 ♞e4 8.♞xd4 ♞xd4	1871
12	George Mackenzie	Frederic Elder	1	5...exd4 6.0-0 ♟e7 7.e5 ♞e4 8.♞xd4 ♞xd4	1871
13	George Mackenzie	Szymon Winawer	1	5...exd4 6.0-0 ♟e7 7.e5 ♞e4 8.♞xd4 ♞xd4	1878
14	David Gertler	Rigel Cappallo	1	5...exd4 6.0-0 ♟e7 7.e5 ♞e4 8.♞xd4 ♞xd4	1993
15	Alexander Alekhine	Richard Teichmann	1	5...exd4 6.0-0 ♟e7 7.e5 ♞e4 8.♞xd4 0-0	1911
16	Christopher Yoo	Nikita Matinian	1	5...exd4 6.0-0 ♟e7 7.e5 ♞e4 8.♞xd4 0-0 9.♙e1	2022
17	Christopher Yoo	Vahap Sanal	1	5...exd4 6.0-0 ♟e7 7.e5 ♞e4 8.♞xd4 0-0 9.♙e1	2022
18	Vasif Durarbayli	Daniil Dubov	1	5...exd4 6.0-0 ♟e7 7.e5 ♞e4 8.♞xd4 0-0 9.♞f5 d5 10.♞xe7+	2021
19	Gawain Jones	David Anton Guijarro	1	5...exd4 6.0-0 ♟e7 7.e5 ♞e4 8.♞xd4 0-0 9.♞f5 d5 10.♞xe7+	2022
20	David Gertler	Mark Brodie	1	5...exd4 6.0-0 ♟e7 7.e5 ♞e4 8.♞xd4 0-0 9.♞f5 d5 10.♟xc6	1989

\* = transposed to this line

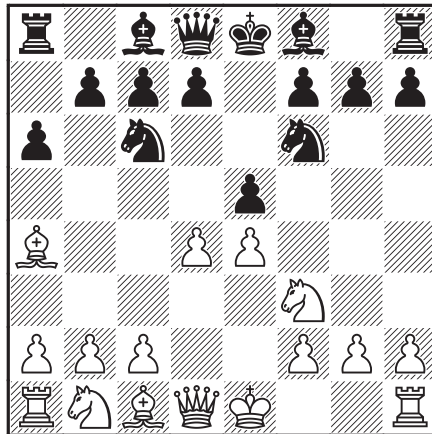
Game	White	Black	Chapter	Variation	Year
21	Roberto Martin del Campo	Johann Hjartarson	1	5...exd4 6.0-0 ♗e7 7.e5 ♗e4 8.♗xd4 0-0 9.♗f5 d5 10.♗xc6	1990
22	Valery Zhidkov	Vadim Faibisovich	1	5...exd4 6.0-0 ♗xe4*	1976
23	Nikola Djukic	Drasko Boskovic	1	5...exd4 6.0-0 ♗xe4*	2002
24	Kjetil Lie	Geir Ostmo	1	5...exd4 6.0-0 ♗xe4*	2007
25	Jonah Willow	Rajat Makkar	1	5...exd4 6.0-0 b5 7.♗b3 d6	2022
26	Jose Berasain	Jose Capablanca	1	5...exd4 6.0-0 b5 7.♗b3 ♗e7	1911
27	John Donaldson	Uriel Zak	1	5...exd4 6.0-0 b5 7.♗b3 ♗e7	1984
28	Christopher Yoo	Martyn Kravtsiv	1	5...exd4 6.0-0 b5 7.♗b3 ♗e7	2022
29	Robert Fischer	Petar Trifunovic	1	5...exd4 6.0-0 b5 7.♗b3 ♗xe4*	1961
30	Balaji Daggupati	Alexey Sarana	1	5...exd4 6.0-0 b5 7.♗b3 ♗xe4	2022
31	George Mackenzie	Berthold Englisch	1	5...exd4 6.0-0 ♗c5	1878
32	Albert Bokros	Imre Kincs	1	5...exd4 6.0-0 ♗c5	2009
33	Geza Maroczy	Hans Kmoch	1	5...exd4 6.0-0 d6	1922
34	Aivars Gipslis	Jerzy Kostro	1	5...exd4 6.0-0 d6	1976
35	Julio Ostos	Gildardo Garcia	2	5...♗xd4 6.♗xd4 exd4 7.e5 ♗e4 8.♗xd4 ♗c5 9.0-0	1980
36	David Gertler	Dexter Thompson	2	5...♗xd4 6.♗xd4 exd4 7.e5 ♗e4 8.♗xd4 ♗c5 9.♗c3 ♗xa4	2017
37	Masoud Mosadeghpour	Mohammad Miran Khademi	2	5...♗xd4 6.♗xd4 exd4 7.e5 ♗e4 8.♗xd4 ♗c5 9.♗c3 c6	2017
38	George Mackenzie	Samuel Rosenthal	2	5...♗xd4 6.♗xd4 exd4 7.e5 ♗e4 8.♗xd4 ♗c5 9.♗c3 ♗e7 10.♗b3	1883
39	Nigel Short	Viktor Korchnoi	2	5...♗xd4 6.♗xd4 exd4 7.e5 ♗e4 8.♗xd4 ♗c5 9.♗c3 ♗e7 10.♗g4	1980
40	Jose Capablanca	Leonard Meyer	3	5...♗xe4 6.d5	1908
41	Alexandra Kosteniuk	Gulmira Dauletova	3	5...♗xe4 6.♗e2 ♗d6	2020
42	Albert Bokros	Zoltan Nemeth	3	5...♗xe4 6.♗e2 ♗d6	2000
43	Emanuel Lasker	Manuel Marquez Sterling	3	5...♗xe4 6.♗e2 d5	1900

\* = transposed to this line

Game	White	Black	Chapter	Variation	Year
44	Norbert Friedrich	Stefan Hubschmid	3	5...♗xe4 6.♖e2 b5 7.♗xe4 bxa4	2007
45	Ratmir Kholmov	Abram Khasin	3	5...♗xe4 6.♖e2 b5 7.♗xe4 d5	1961
46	Irene Sukandar	Adam Frank	4	5...b5 6.dxe5 bxa4	2021
47	David Gertler	Bill Wong	4	5...b5 6.dxe5 ♗xe4	2010
48	Pia Cramling	Kai Bjerring	4	5...b5 6.dxe5 ♗xe4*	1980
49	David Gertler	Unknown	4	5...b5 6.dxe5 ♗xe4	2024
50	Jesus Nogueiras	Gildardo Garcia	4	5...b5 6.♙b3 exd4 7.0-0	1979
51	Julio Ostos	Oscar Castro	4	5...b5 6.♙b3 exd4 7.e5	1987
52	Laszlo Barczay	Umberto Masera	7	3...♗f6 4.d4 ♗xd4 5.♗xd4 exd4 6.e5 c6 7.♗xd4	1970
53	Vugar Gashimov	Alexei Shirov	7	3...♗f6 4.d4 ♗xd4 5.♗xd4 exd4 6.e5 c6 7.♗xd4	2009
54	Paul Morphy	Adolf Anderssen	7	3...♗f6 4.d4 ♗xd4 5.♗xd4 exd4 6.e5 c6 7.0-0	1858
55	Henry Bird	Wilhelm Steinitz	7	3...♗f6 4.d4 ♗xd4 5.♗xd4 exd4 6.e5 c6 7.0-0	1866
56	Igor Yagupov	Gennady Sergeev	7	3...♗f6 4.d4 exd4 5.0-0 ♗xe4*	2005
57	Alonso Zapata	Antonis Antoniou	7	3...♗f6 4.d4 exd4 5.0-0 ♙c5	1998

\* = transposed to this line

## Introduction: Meet the Mackenzie!



The Mackenzie Variation, a quick central attack in the Ruy Lopez, is a refreshing twist on a traditional opening. It can push your opponents into sharp positions full of dangers.

Named for a 16<sup>th</sup>-century Spanish priest, the Ruy Lopez (1.e4 e5 2.♘f3 ♘c6 3.♙b5) is perhaps the best-known chess opening. It has long been a favorite of everyone from novices to world champions.

“Classical” lines of the Ruy, played for centuries, typically involve slow, drawn-out maneuvering. All that practice has produced tons of book lines; whichever player memorizes them better will likely gain an advantage.

An experienced player who enters the standard Ruy Lopez line 3...a6 4.♙a4 ♘f6 with Black is probably well prepared for the most common responses: the standard 5.0-0 and the currently popular 5.d3. But you might catch them off guard with something less usual – such as the Mackenzie!

This line, based on smashing the center open with 5.d4, will be a rude shock to many opponents. Thrown out of their book knowledge, they will be forced to make a series of tough decisions. It’s like giving them a quiz where one wrong answer can cost them the game. (And anyone who finds enough good moves to “pass the quiz” would have been tough to beat no matter *what* you played!)

### Who was Mackenzie?

This Ruy Lopez line with 5.d4 is widely called the Mackenzie Variation in honor of George Henry Mackenzie, an early pioneer of the move in high-level competition. A Scottish-born master, he was a leading U.S. player in the late 1800s, winning many major domestic tournaments including three American

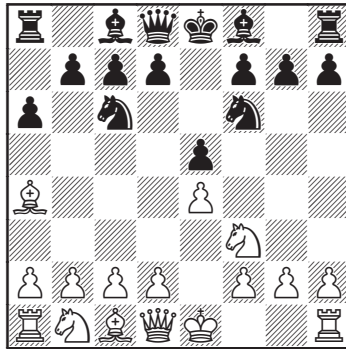
Chess Congresses. He also placed highly in European events where he vied with the world’s elite. Chess historian Vlastimil Fiala wrote that Mackenzie “assumed the unofficial title of American champion from the retired Morphy.”<sup>1</sup>

However, Mackenzie wasn’t the first player of this line. The earliest use I found was in a Morphy–Löwenthal match game in 1858. Commenting on the fifth move of that game, Tartakower and du Mont wrote, “More vigorous is 5 Castles, but Morphy always liked to open up the game as soon as possible.”<sup>2</sup> Maybe you, too, would like to open the position against unsuspecting opponents!

### Why an early d4 in the Ruy Lopez makes sense

A fundamental chess principle is “Open the position when you are ahead in development.” Does that apply to the Mackenzie?

Look at the position after 1.e4 e5 2.♘f3 ♘c6 3.♙b5 a6 4.♙a4 ♞f6.



Count the pieces moved. Each player has developed two minor pieces (a bishop and a knight for White, two knights for Black). In addition, each player has advanced the e-pawn two squares, and Black has pushed the a-pawn, though that type of pawn move is not typically counted as “development.”

So where is White’s development advantage that justifies opening the position with 5.d4 (the Mackenzie)?

Although the players have developed the same number of pieces, they are *different* pieces – and that matters. White has developed the pieces that started on f1 and g1 and is ready to castle, safeguarding the king and bringing a rook into play. Black is *not* ready to castle; the f8 bishop must move first. That difference

<sup>1</sup> Vlastimil Fiala, *George Henry Mackenzie: Third US Chess Champion, 1870* (Moravian Chess, 2019), p. 7.

<sup>2</sup> Dr. Savielly Tartakower and Julius du Mont, *500 Master Games of Chess* (G. Bell & Sons, 1952), p. 126.

can justify opening the center, since Black's king position could help White create pins (on the e-file or diagonals) and other attacks (such as threats against the f7 pawn). Already, White's developed bishop makes a masked threat to the Black king along the a4-e8 diagonal.

In addition, as it is White's move, we say White is half a move ahead in development.

So, while the diagram doesn't show a clear development lead, White is poised to create good tactical chances by opening the center with the Mackenzie!

### **Is the Mackenzie the “best” way to play?**

In that standard Ruy Lopez position, is 5.d4 the “best” move? Let's consider what that means.

Finding the best move in a position used to be an art, but super-strong chess programs (“engines”) have made it more of a science. An engine can identify strong moves with great accuracy by performing millions of calculations and applying formulas to assess the resulting positions.

Those may not be the right moves for you, though. If you play moves the engines say are “best,” you might not achieve the best results (or have the most fun). You might not understand how to handle the types of positions produced by those moves, and your opponents might know how to battle against that type of standard play, especially in the opening.

Learning a less-usual but sound opening variation, such as the Mackenzie, may bring you more wins. You will know the variations – and understand the resulting positions – better than your typical opponent will. You may also enjoy playing fresh positions instead of imitating main-line strategies.

Also, think of all the Ruy Lopez defenses your opponents may have planned to play: the main line Closed System, the Open Variation, the Marshall Attack, the Arkhangelsk Defense, or many others. With the Mackenzie, you will short-circuit their plans and force them to battle on *your* terms.

My research and experience show that the Mackenzie gives the White player excellent practical chances. Many of Black's obvious replies enable White to play sharp tactics and powerful attacks.

If you're a creative and aggressive player – or want to become one! – the Mackenzie is a great way for you to blaze new paths, shock opponents, and score some cool wins.

### **How good is it really?**

If the Mackenzie is so fearsome, why don't grandmasters play it?

The short answer: some *have* played it and *do* play it, as a surprise weapon or just to avoid play-by-rote Ruy lines. Legendary players who have used it



in tournaments include world champions Lasker, Alekhine, and Tal (plus uncrowned champ Morphy), as well as elite women such as world champs Gaprindashvili and Chiburdanidze and top-rated Cramling. Chapter 1, section B, shows how Bobby Fischer contributed to Mackenzie theory in a game that transposed after starting as an Open Ruy Lopez.

The longer answer: the Mackenzie is not popular at the professional level today because a strong, well-prepared Black player is likely to reach an equal position ... and pros' opponents are usually strong and well prepared.

But *my* opponents, even masters, have usually been *unprepared*. And trying to calculate the complications has cost them a lot of time – an advantage in fast games in particular!

### **Mackenzie successes**

I located 16 games in which Mackenzie played this line. His opponents were mostly prominent masters, including such late-1800s stalwarts as Zukertort, Winawer, and Gunsberg. His dominating record: 11 wins, 5 draws, 0 losses!

I was inspired to try the Mackenzie after seeing a game in which Pia Cramling nearly defeated Viktor Korchnoi with it (see Game 3 in the chapter 1 Games section). The first 11 times I played it in tournaments, I scored 11 wins! While those opponents were non-masters, many were rated in the 2000s, high enough that I wouldn't be expected to win every game.

I've also had tremendous success with the Mackenzie in online blitz games. As of this writing, I have played it more than 1,000 times against opponents with ratings similar to mine. My approximate score with it: 65% wins, 7% draws, 28% losses. This means I've earned more than two-thirds of the possible points in those games.

### **Other resources and this book**

For years, I have tried to research Mackenzie Variation theory. I found two booklets, from many years ago, about the Center Attack (5.0-0 ♖e7. 6.d4) – a line that the Mackenzie can (but often won't) transpose into. Some general Ruy Lopez books analyze a few of the main Mackenzie variations. And a recent video series about the Mackenzie was limited in depth due to the video format.

There appeared to be a big gap: no thorough reference work purely about playing the Mackenzie. So I decided to write this book.

This is a repertoire book for White. That means it doesn't give every variation for both players. Instead, it recommends what White should do in each position. I occasionally recommend a simple way to get an edge rather than a more complicated "engine" line. In some cases, I explore multiple White moves so you can choose the one that best fits your style.

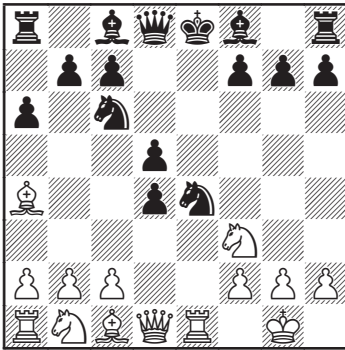
Model games, many by top players, appear after most of the analysis chapters. The games that don't follow my recommended lines still give a flavor of thematic Mackenzie strategies and tactics. And many of them feature instructive (and cool) breakthroughs!

### Some common Mackenzie themes

Many Mackenzie lines lead to positions with similar themes. Recognizing those themes will help you understand how to treat the positions. Here are three examples.

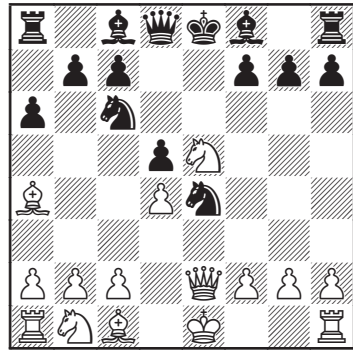
If Black plays ... $\text{Nxe4}$  at an early opportunity, White can often apply pressure with pins along both the e-file and the a4-e8 diagonal. See the following diagrams.

1.e4 e5 2.Nf3 Nc6 3.Bb5 a6  
4.Ba4 Nf6 5.d4 exd4 6.0-0 Nxe4  
7.Rxe1 d5



Chapter 1, line B

1.e4 e5 2.Nf3 Nc6 3.Bb5 a6  
4.Ba4 Nf6 5.d4 Nxe4 6.Qe2 d5  
7.Nxe5

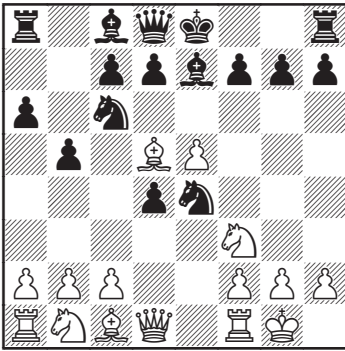


Chapter 3, line 3

Both Black knights are in danger in such lines. Depending on the position, White's f3 knight might attack the pinned c6 knight from d4 or e5. Once White moves that knight, Black's e4 knight, which cannot move safely, may be vulnerable to attack by the pawn moving to f3. Black will have trouble eliminating all the threats.

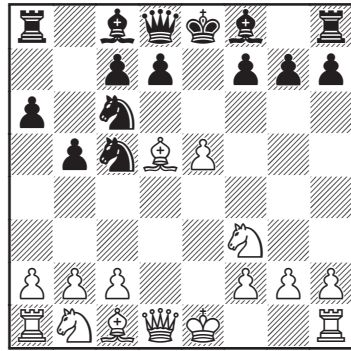
Another common theme arises if Black plays a quick ...b5 against the Mackenzie. White's bishop can often get to d5 after its initial retreat to b3. On d5, it will likely pin the knight on c6 to the rook on a8, so that Black must spend time unpinning the knight before it can help fight for the center. Here are two of the lines featuring this type of setup.

1.e4 e5 2.♘f3 ♘c6 3.♙b5 a6  
 4.♙a4 ♘f6 5.d4 exd4 6.0-0 b5 7.♙b3  
 ♙e7 8.e5 ♘e4 9.♙d5



Chapter 1, line C4c

1.e4 e5 2.♘f3 ♘c6 3.♙b5 a6  
 4.♙a4 ♘f6 5.d4 b5 6.dxe5 ♘xe4  
 7.♙b3 ♘c5 8.♙d5



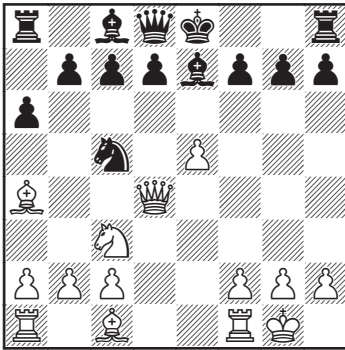
Chapter 4, line 1d4

If Black eventually captures the d5 bishop with a minor piece, White should be ready to recapture with the knight from c3, maintaining strong piece placement in the center. Whether the White piece on d5 is a bishop or a knight, it pressures both the queenside and kingside from its central square.

In addition, White's king's knight often swings to d4 (perhaps capturing a pawn) and threatens to take a strong outpost at f5. If Black prevents that by playing ...g6, then dark-square weaknesses appear around Black's king, making it easier for White's attackers to infiltrate.

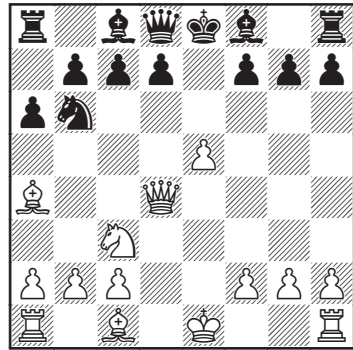
A third common Mackenzie theme occurs when White's queen captures a knight on d4, while Black's knight from f6 circles to c5 or b6, from which it can exchange the bishop on a4. Here are two examples.

1.e4 e5 2.♘f3 ♘c6 3.♙b5 a6 4.♙a4  
 ♘f6 5.d4 exd4 6.O-O ♙e7 7.e5 ♘e4  
 8.♘xd4 ♘xd4 9.♚xd4 ♘c5 10.♘c3



Chapter 1, line A2c

1.e4 e5 2.♘f3 ♘c6 3.♙b5 a6  
 4.♙a4 ♘f6 5.d4 ♘xd4 6.♘xd4 exd4  
 7.e5 ♘d5 8.♚xd4 ♘b6 9.♘c3



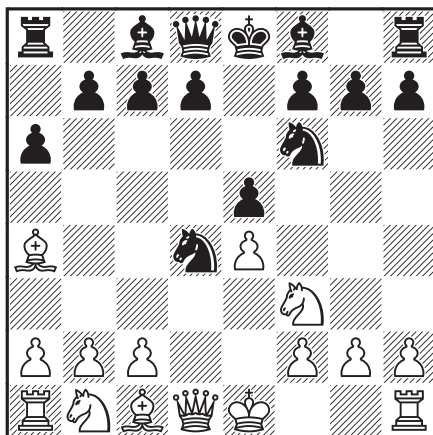
Chapter 2, line 1b

In these positions, if Black captures the bishop, White usually recaptures with the queen. This will likely dissuade Black from playing ...b5, since White may be able to capture that pawn with the knight because the a-pawn is pinned to the rook.

If Black has not yet developed the f8 bishop (as in the last diagram), White can often meet that bishop's move with ♚g4, attacking the g-pawn and preventing castling due to the follow-up ♙h6. If Black finds an effective move order, though, and is able to castle safely, it may be hard for White to prevent ...d6 or ...d5, claiming a share of the center. Then the stage will be set for a battle from a roughly equal start.

## Chapter 2

### The solid 5...♞xd4



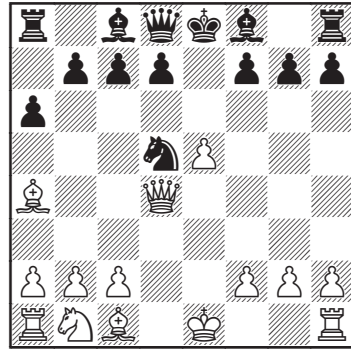
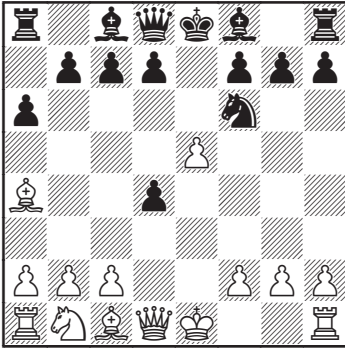
Black might be hesitant to capture the audacious d-pawn with the knight. White can trade on d4 and then push the e-pawn, capturing central space and forcing the other knight to move while the Black king is still vulnerable in the center.

Despite its hazardous appearance, though, 5...♞xd4 is actually a good way for Black to seek equality, as the following analysis will show. As in other variations, traps still lurk along Black's path, giving White good practical chances. However, if Black manages to evade those traps, an even game may result. That's why some strong grandmasters (such as Pachman, Beliavsky, and Korchnoi) have chosen to meet 5.d4 with 5...♞xd4.

Since 6.♞xe5 achieves little after 6...♞e6 (intending moves such as ...♞c5 or ...b5), White should reply with 6.♞xd4.

Now, an ambitious opponent may try to complicate matters with 6...b5. White gets a nice advantage by playing 7.♞xb5 axb5 8.♙xb5. Even if Black regains the pawn (in a line such as 8...♙b7 9.♞c3 ♞xe4), White's outside passed pawn can advance quickly, forcing Black to dedicate some pieces to stopping it.

Nearly everyone, though, will play the automatic recapture 6...exd4. White can then proceed with 7.e5, threatening the knight.

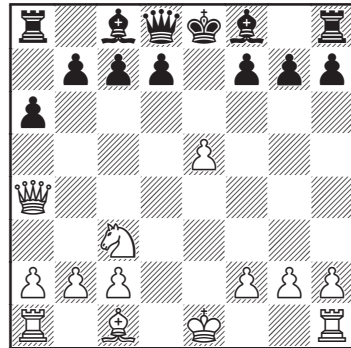


Several of Black's potential replies can be dismissed quickly. Both 7...  $\text{Ng8}$  (an ugly retreat) and 7...  $\text{We7}$  impede Black's development. White can meet the latter move with 8.0-0, when the greedy capture 8...  $\text{Wxe5}$  gets crushed by 9.  $\text{Te1}$   $\text{Ne4}$  10.f3. Meanwhile, 7...b5 costs a piece if White replies 8.exf6, since 8...bxa4 9.  $\text{We2+}$  is lethal.

Thus, Black has only two noteworthy moves from the diagrammed position.

### 1) 7... $\text{Nd5}$

As mentioned in chapter 1, ...  $\text{Nd5}$  is usually weaker than ...  $\text{Ne4}$  in such positions. If the knight must retreat to the queenside, it will be somewhat out of play on b6 (rather than more centralized after reaching c5 via e4). White can reply with 8.  $\text{Wxd4}$ , forcing Black to make a decision.



1a) After 8...c6, White can try to exploit Black's weakened dark squares. A natural start is 9.  $\text{Nd2}$ , eyeing a jump to e4.

1b) Black may try 8...  $\text{Nb6}$  instead, but after 9.  $\text{Nc3}$   $\text{Nxa4}$  10.  $\text{Wxa4}$ , White's active queen is surprisingly effective in slowing Black's development, as the following lines show.

1b1) If Black breaks the d-pawn pin by kicking White's queen with 10...b5, then 11.  $\text{Nxb5}$  would create an unclear position after 11...  $\text{Qb7}$  12.  $\text{Nc3}$   $\text{Qxg2}$ . Instead, 11.  $\text{We4}$  keeps White's leads in space and development.