Inherent case as a PP-case
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1. Introduction

The purpose of this talk is two-fold:
- Consider case-alternations in Polish, e.g. (1), which suggest an analysis in which inherent case is analyzed as the realization of a PP (cf. Řezáč 2008; McFadden 2014).

(1) a. Pięć ptaków spało.  Nominative Environment
   Five birds.gen slept.n.sg
   ‘(The) five birds slept.’

b. ...z pięcioma ptakami Instrumental Environment
   with inst five.inst birds.inst
   ‘...with five birds.’

- Consider the implications of this treatment of inherent case for systems of case and agreement in other languages.

Roadmap
- Case alternations in Polish: Numerals, negation, and coś
- Semi-lexicality and its interaction with case alternations
- Treating inherent case as a PP-case: Deriving case alternations
- Implications of PP-case for systems of case and agreement

2. Case alternations in Polish

Numerals:

(2) a. Pięć ptaków spało.  Nominative Environment
   Five birds.gen slept.n.sg
   ‘(The) five birds slept.’

b. ...z pięcioma ptakami Instrumental Environment
   with inst five.inst birds.inst
   ‘...with five birds.’

(3) NOMINATIVE Pięć ptaków gen.pl
     ACCUSATIVE Pięć ptaków gen.pl
     GENITIVE Pięciu ptaków gen.pl
     INSTRUMENTAL Pięcioma / Pięciu ptakami inst.pl
     DATIVE Pięciu ptaków dat.pl
     LOCATIVE Pięciu ptakach loc.pl

3. Implications of PP

   a. Consider the implications of this treatment of inherent case for systems of case and agreement in other languages.

   Semi-lexical coś (Rutkowski & Szczegot 2001):

   (6) a. On widział coś miłego.  Accusative Environment
      He.nom saw.3.sg something nice.gen
      ‘He saw something nice.’

   Negation:

   (4) a. Łukasz widział dziewczynę.  Accusative Environment
      Łukasz.nom saw.3.sg girl.acc
      ‘Łukas saw a girl.’

   (5) b. Łukasz nie widział dziewczyny.  Dative Environment
      Łukasz not saw.3.sg girl.gen
      ‘Łukas did not see a girl.’

   Generalizations:
   - INSTRUMENTAL, DATIVE, and LOCATIVE cases behave similarly, taking precedence over the GENITIVE of numerals, negation and coś.
   - NOMINATIVE and ACCUSATIVE allow GENITIVE assignment.
   - GENITIVE case is ambiguous as to whether it patterns with the INSTRUMENTAL, DATIVE, and LOCATIVE, or NOMINATIVE and ACCUSATIVE.

   With regards to these cases, Przepiórkowski (1999: 123) conducted a number of tests to determine their “structural” or “inherent” nature. This is repeated in the table below:

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<tr>
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<th>GEN OF NED</th>
<th>NOMINALIZATION</th>
<th>Dużo / nic</th>
<th>Po</th>
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The genitive appears to function both as a structural and inherent case, depending on context.

3. **Semi-lexicality and its relation to case alternations**

   (2) a. Pięć ptaków spało.  
      Five birds.Gen slept.N.SG  
      'The five birds slept.'

   **Claim:** Polish 5+ numerals (5-10, 100) are semi-lexical, defective nouns.

   **Defining semi-lexicality (built on Baker 2003):**
   - **Lexical nouns:** Introduce valued phi features (number, gender)
   - **Lexical adjectives:** Carry unvalued phi features (number, gender); depend on something with valued phi for valuation.
   - **Semi-lexical elements:** Some non-lexical combination of phi-features (e.g. valued number, unvalued gender, valued number, missing gender, etc.)

   **Claim:** 5+ numerals are semi-lexical: they carry a number feature, but lack a gender feature.

   **Number:** External agreement by a demonstrative (or adjective) is plural, not singular.

   (8) a. Te, / tych, pięć, dziewczyn,  
       These.N.PL.NOM / these.N.PL.GEN  
       five girl.N.PL.GEN  
       'These five girls'
   b. *To, / ten, / ta pięć dziewczyn  
      This.N.SG.NOM / this.M.SG.NOM / this.F.SG.NOM  
      five girl.F.PL.GEN

   **Gender:** Numerals trigger NEUTER SINGULAR verbal agreement; this contrasts with the behavior of the verb when no numeral is present, suggesting the numeral is directly responsible:

   (9) Pięć dziewczyn spało.  
      Five girl.F.PL.GEN slept.N.SG  
      'The five girls slept.'

   Tests consisted of the following:
   - **GEN of NEG:** Ability to be marked GENITIVE in the presence of negation
   - **NOMINALIZATION:** Ability to be marked GENITIVE in nominalizations
   - **Dużo/nic:** Availability of these elements in a particular case positions
   - **Po:** Availability of the distributive marker po
   - **NP[INST]:** Possibility of being predicated on by an INSTRUMENTAL nominal

   The verbal agreement is not the result of N.SG features on the numeral. If it were, then the coordination of two numeral phrases should allow the same range of agreement as the coordination of two N.SG nouns. This is false – agreement remains N.SG:

   (11) a. Krzesło i biurko rozbiły się.  
       Chair.N.SG and desk.N.SG broke.N.PL PT  
       'A chair and desk broke.'
   b. Pięć krzeseł i sześć biurek rozbiło się.  
      Five chair.Gen and six desk.Gen broke.N.SG PT  
      'Five chairs and six desks broke.'

   We can understand this if we treat the N.SG as default agreement (Preminger 2011; Dziwirek 1990). Numerals are an agreement target, but they lack gender, leading to default agreement.¹

   (12)  
   Default Agreement: N.SG  
   $$\varphi$$ 5+ numerals have valued (inherent) number, but are missing gender.  
   $$\varphi$$ 5+ numerals are semi-lexical.

   The semi-lexicality of numerals 5+ appears to have consequences for case alternations.

   Consider numeral 1000, which differs from numerals 5+ for agreement:

   (13) Pięć ptaków spało.  
       Five birds.Gen slept.N.SG  
       'Five birds slept.'
   (14) %Cały tysiąc ptaków spał.²  
       'A whole thousand birds slept.'

   Numeral 1000 triggers MASCULINE SINGULAR agreement, suggesting it carries both gender and number, like a lexical noun. Like numeral 5, numeral 1000 also triggers GENITIVE case.

   Numeral 1000 also allows for plural morphology (unlike numeral 5):

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¹ This analysis adopts a nominative-genitive interpretation of Polish numeral morphology (Doroszewski 1952; Klockmann 2014). See Appendix I for discussion of the issue and the competing accusative interpretation (Franks 1994, 2002; Przepiorkowski 1999).
² For many speakers, verbal agreement with numeral 1000 is only possible if some modifier is present.
Although, for number, for example, this improves if modifiers are added (but see also footnote 2 in this regard):

(28) Very large numbers of students choose to seek some form of education or training (COCA: Corpus of Contemporary American English)

In Estonian, pseudo-partitives show case alternations similar to those found in Polish:

(29) a. Tükki leiba
   Piece bread.PART
   ‘A piece of bread’
   b. tüki-le leiva-le
   piece-ALL bread-ALL
   ‘Onto a piece of bread’ (Norris 2014: 180)

The pattern is also found with numerals in Finnish, Estonian, and Inari Sami, as well as other Slavic languages:

(30) a. Kaks inimest
   Two.nom.sg person-part.sg
   ‘Two people’
   b. Kahe-l koosoleku-l
   two-ade meeting-ade
   ‘In two meetings’ (Norris 2014: 128)

(31) a. Ivan osti viisi auta-a
   Ivan bought five car-part
   ‘Ivan bought five cars.’ (Brattico 2011: 1045)
   b. Minä asuin kolmessa talossa.
   ‘I lived three house-ini.
   ‘I lived in three houses.’ (Brattico 2011: 1051)

(32) a. Čiččam poccud láa tobbeen.
   Seven reindeer.part.sg are.3pl there
   ‘Seven reindeer are there’ (Nelson & Toivonen 2000: 181)
   b. Mun adelim kiirijj kávcí almai.
   I.nom gave book.acc.pl eight man.ill.sg
   ‘I gave books to eight men.’ (Nelson and Toivonen 2000: 183)

The numerals of these languages might be semi-lexical in some way.

For example, according to Brattico (2011) and Norris (2014), Finnish and Estonian numerals are incapable of pluralizing in this construction. If they are to pluralize (i.e., when quantifying *plurallia tantum* nouns), then they no longer engage in case alternations, instead showing case agreement throughout, seemingly behaving like adjectives.

(33) kahe-d püksi-d
    two-nom.pl pant-nom.pl
    ‘two pairs of pants’ (Norris 2014: 81)

(34) Minä näin kahe-t saks-t.
    I saw two-acc.pl scissors-acc.pl
    ‘I saw two scissors.’ (Brattico 2011: 1045)
Summarizing:
- Polish shows a relation between semi-lexicality and case alternations.
- Case alternations are also found in other languages, particularly with elements which we might consider to be semi-lexical.
- Languages without case (English) show a similar pattern of ignoring the higher element for purposes of agreement.
- We see here a correlation between semi-lexicality and the invisibility of the higher element for certain processes (case, agreement).

4 Case alternations: Inherent case as a PP-case

The Polish case alternation divide appears to respect the inherent-structural case divide (although see Brattico 2010, 2011 who shows that this does not follow in Finnish).

Babby (1987) proposes the following case hierarchy for Russian:

(35) Lexical/Inherent case > Structural case
- **Lexical** case: Idiosyncratically assigned case
- **Inherent** case: Theta related case

**Question:** How are lexical/inherent and structural case assigned?

**Answers:**
- **Standard Minimalism** (Chomsky 1986, 2000, 2001; Řezáč 2008):
  Structural case is assigned as a reflex of agree. **Nominative** case is assigned through agreement with T and **Accusative** through agreement with v. Inherent case is related to theta role assignment (Chomsky 1986), assigned through a P-head (Řezáč 2008).
- **Dependent case** (Marantz 1991; McFadden 2004; Bobaljik 2008; Preminger 2011; Baker in progress):
  Cases are assigned in a particular order, given in the hierarchy below. Dependent and unmarked case are computed on the basis of structural configuration.

(36) Lexical/Inherent case > Dependent case (ERG, ACC) > Unmarked case (ABS, NOM)

(37) Dependent Case Assignment (roughly):
  a. **Accusative:** If two nominals are present in the same domain, mark dependent case (ACC) on the **lower** one and unmarked case (NOM) on the **higher** one. If there is only a single nominal, mark it with the unmarked case (NOM).
  b. **Ergative:** If two nominals are present in the same domain, mark dependent case (ERG) on the **higher** one and unmarked case (ABS) on the **lower** one. If there is only a single nominal, mark it with the unmarked case (ABS).

**Note:** Lexical/Inherent cased nominals are invisible to this operation.

(38) a. Transitive (ACC) b. Transitive (ERG) c. Intransitive (ACC/ERG)

Questions:
- a. Why is lexical/inherent case assigned first?
- b. Why is lexical/inherent case not assigned through a case computation?

⇒ If we assume there is a P-head involved in lexical/inherent case assignment which creates a barrier to external processes, then, plausibly, this P-head makes the nominal invisible to case computations, regardless of when it is assigned.
- **Case spreading/stacking** (Richards 2007; Matsushansky 2008, 2010; Pesetsky 2013):
  Case assignment spreads downwards from the head which initiates the assignment until some barrier is reached. If a language does not allow multiple Spell-Out of case, some mechanism will determine which case appears overtly.

With regards to the question of structural case, we have three answers:
- **Minimalism:** It is assigned through an agreement relation with some functional head.
- **Dependent case:** It is calculated on the basis of the structural configuration.
- **Case stacking:** Percolation of it is triggered by some head.

With regards to the question of inherent case, the approaches appear to converge:
- **Minimalism:** It is assigned through a P-head (Rézáč 2008)
- **Dependent case:** It is assigned early, possibly due to being embedded under a P-head.
- **Case stacking:** Percolation of it is triggered by some head (a P-head in Pesetsky 2013)

Let us assume that inherent/lexical case is assigned by some form of a preposition (P-head). We will leave open the nature of structural case assignment.

Now we return to case alternations:

4.1 Case alternations with numerals in Polish:

(39) a. Pięć ptaków spało.  Nominative Environment
   Five birds.gen slept.n.sg
   *(The) five birds slept.

   b. ...z pięcioma ptakami  Instrumental Environment
Numerals trigger genitive case assignment. Under a(n) …
- agreement approach, the genitive case assigner agrees/assigns in all case contexts (implicitly requires some form of case stacking).
- dependent case approach, genitive case is assigned as a default only if no other case is assigned before the closure of the extended projection (PP), (Norris 2014)
- case stacking approach, genitive case is assigned in all case contexts.
- (How might we disambiguate among these approaches?)

Assume P-heads have a selectional requirement for lexical nouns.
- Let’s model this relation through agreement, where the P-head is a probe with a full set of phi-features.

Upon first merge, the P-head will probe for something with a full set of phi-features.
- Semi-lexical numerals will fail to satisfy the probe, leading it to probe past the numeral to the noun.
- Regardless of how GENITIVE would otherwise be realized (through agreement, as a default, through percolation), the P-case will appear overtly on the numeral and noun:
  - Agreement: Some functional projection agrees and assigns GEN to the noun; this would later be overwritten by the P-case
  - Dependent case: The P-case would be assigned before the default GEN is triggered.
  - Case stacking: The P-case overwrites the GEN.

Aside: We seem to see a distinction between probes internal to the extended projection (Grimshaw 1991) and probes external to it: P-cases, demonstratives, and adjectives can access the embedded nominal, while verbs seem unable to.

4.2 Case alternations with negation in Polish:

- Required assumption: Cases assigned external to the extended projection (NOMINATIVE, ACCUSATIVE) cannot access the embedded nominal, while cases assigned internal to it (P-cases) can.

This gives us the result that P-cases appear on the lexical noun, while NOMINATIVE and ACCUSATIVE do not.

Case alternations with Polish cos: Assuming cos to be semi-lexical, the same analysis as applies to numerals applies to cos.

4.2 Case alternations with negation in Polish:

a. Łukasz widział dziewczyny.  
   Accusative Environment
   Łukasz.NOM saw.3.MSG girl.ACC
   ‘Łukas saw a girl.’

b. Łukasz nie widział dziewczyny.
   Łukasz.NOM not saw.3.MSG girl.GEN
   ‘Łukas did not see a girl.’

a. Łukasz ufa dziewczynie.
   Dative Environment
   Łukasz trusts.3.SG girl.DAT
   ‘Łukas trusts the girl.’

b. Łukasz nie ufa dziewczynie.
   Łukasz not trust.3.SG girl.DAT
   ‘Łukas does not trust the girl.’

Negation triggers GENITIVE case assignment to nominals which it c-commands. Note that this can also involve (multiple) nominals in embedded infinitival clauses:

a. Nie kazalam Marii pisać listów.
   Subject Control
   Not order.1SG.M Mary.DAT write.INF letters.GEN
   ‘I didn’t order/ask Mary to write letters.’

b. Nie chciałam pisać listów.
   Subject Control
   Not wanted.1SG.M write.INF letters.GEN
   ‘I didn’t want to write letters.’

c. Nie wydawal się pisać listów.
   Subject Raising
   Not seem PART write.INF letters.GEN
   ‘He didn’t seem to be writing letters.’

d. Nie musisz zamierzać przestać studiować algebry.
   Multiple Embeddings
   Not must.2SG intend.INF stop.INF study.INF algebra.GEN
   ‘You don’t have to intend to stop studying algebra.’ (Przepiórkowski, 1999: 143-144)
5. Inherent case as a PP-case: Relations between case and agreement

Prediction: If PP-cases are invisible to external case assignment processes, then presumably, they are also invisible to other external processes, such as agreement.

Bobaljik (2008) argues that case feeds agreement, where agreement targets the highest nominal with an accessible case, where accessibility is language specific.

Unmarked case (Nom, Abs) > Dependent case (Erg, Acc) > Lexical/Inherent case

Hindi (Indo-Aryan): Verbs agree only with absolutive arguments, subject or object:

(49) a. Raam bazaar gayaa.
   RaamABS market go.PAST.M.SG
   ‘Raam went to the market.’

With two absolutive arguments (found with verbs which optionally mark ergative), agreement targets the highest:

(50) a. Us-ne yah baat samjhii.
    He-ERG(M) this matter PERF.F
    ‘He understood this matter.’

Nepali (Indo-Aryan): Verbs agree with the highest argument, absolutive or ergative:

(51) a. ma bas-en
    I-ABS sit-PST.1.SG
    ‘I sat.’

Proposal: Variation is not with regards to where a language draws a line on the accessibility hierarchy, but rather, with regards to whether languages treat ergative as a PP-case or not.

Hindi: Ergative is a PP-case – agreement cannot target ergative subjects.

Nepali: Ergative is not a PP-case, but a structural case – agreement can target ergative subjects.

Hindi:

(52) a. Transitive (= 49b)

Hindi (Indo-Aryan): Verbs agree only with absolutive arguments, subject or object:

(49) a. Raam bazaar gayaa.
   RaamABS market go.PAST.M.SG
   ‘Raam went to the market.’
(c) Semi-transitive: Ergative subject and dative object (= 49c)

TP
T∅default

V/P/VP
SERG(PP)

V

ODAT(PP)

Nepali:

(53) (a) Transitive (= 51b) (b) Intransitive (= 51a)

TP
T∅

V/P/VP
SREG

OABS

Assuming the ergative marker to be a P which selects for oblique case, the morphological example, the ablative (indicating source or origin):

form is the same form which is required by a number of postpositions in the language, for example, the ablative (indicating source or origin):

Interestingly, the ergative marker ne requires the nominal to be in an oblique form; this oblique form is the same form which is required by a number of postpositions in the language, for example, the ablative (indicating source or origin):

(55) Is jel te hū~ kis-lāne nas-ū~.
3SG.PROX.OBL jail from 1SG.NOM INDEF.OBL-way run.away-1SG
‘How shall I escape from this jail?’ (Losey 2002: 118)

Assuming the ergative marker to be a P which selects for oblique case, the morphological and agreement facts can be captured.

Question: What could there be that selects for an inherent subject in transitive clauses but not intransitive clauses?

Answer: Some languages have transitivity morphemes, which serve to indicate that a clause is transitive. These morphemes do not occur in intransitive clauses.

(56) Bardi (Nyulnyulan language of Australia)

a. Aalin-nim i-rr-o0-moogar-n maalbarnd-0 garnidi.
Sea.eagle-ERG 3-AUG-TR-make-CONTnest-ABS on.top rock.LOC
‘Eagles make their nests on top of rocks.’ (Bowern 2012: 468)

b. I-m-boonkoonkooma-na jiirlanboo.
3-PST-swell.up-REM.PST porcupine.fish
‘The porcupine fish swelled up.’ (Bowern 2012: 463)

(57) Garifuna (Arawakan language of Central America)

a. Etha n-unu-tiba.
See P1.SG-AUX.TR.NFUT-T2.SG
‘I see you.’ (Barchas-Lichtenstein 2012: 166)

b. Öumuga-tina.
Sleep-T1SG
‘I sleep.’ (Barchas-Lichtenstein 2012: 172)

Such morphemes could indicate the presence of a transitive head which is responsible for selecting for an ergative PP. See Chomsky’s work for similar ideas involving transitive v*.

Summarizing:
- Expanding beyond Polish case alternations, we can apply the analysis of inherent case as a PP-case to other languages, modeling the relation between case and agreement.
- If some ergatives are PPs and others are structural (DPs), agreement is predicted to target specifically structural ergatives (although see Řezáč 2008 for some examples of transparent PPs)
- More work is required to determine whether there are differences beyond agreement and morphology for inherent and structural ergatives.

6. Conclusion

- Polish has case alternations with numerals, negation, and coquelle, where structural case environments appear to allow for genitive case assignment while inherent case environments seem not to.
- Numerals can be shown to be semi-lexical, carrying number but lacking gender, and this interacts with case alternations, where semi-lexical elements do not create a barrier for inherent case assignment.
- Treating inherent case as a PP-case, we can derive these case alternations, under the assumption that P-heads select for something lexical.
- This hypothesis can also be extended to model the availability of agreement with an ergative subject in different languages.

7. References


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<th>Description</th>
<th>Example</th>
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<td>Nominal</td>
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According to the Accusative Hypothesis, 5+ numerals are accusative in nominative and accusative cased positions. Motivation for this hypothesis comes from the syncretism of the accusative and genitive for virile gender, but the nominative and accusative elsewhere:

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The Accusative Hypothesis assumes that in nominative case positions, the numeral is accusative, hence the syncretism (or lack thereof) with the genitive:
According to the Nominative-Genitive Hypothesis, 5+ numerals are genitive with virile gender, but nominative with non-virile gender.

The main argument for this hypothesis comes from the paradigms of the numerals 2, 3, and 4. Numeral 2, for example, allows either for agreement with a virile noun, or what appears to be genitive case with default agreement.

Numerals 2, 3, 4 restrict this pattern to virile nouns.

This cannot be captured under the Accusative Hypothesis as it assumes the numeral to be consistently Accusative across genders (this being its virtue for dealing with 5+ numerals). The Nominative-Genitive Hypothesis gives us the tools to unify these phenomena.

Appendix 2: Another (odder) case alternation: Collective numerals